



**State-Boston Retirement Board
(SBRB)**

Room 816, City Hall
Boston, MA 02201



Dates of Engagement
2007 – Present

Purpose / Objectives

- Completion of Request for Proposals for a new retirement solution
- Assistance with procurement activities
- Development of evaluation methodology and scoring package
- Assistance with evaluation of vendor proposals and demonstrations

Nature of LRWL Services

LRWL is providing consulting services related to SBRB's procurement of a new pension administration solution.¹

LRWL staff members share with the project team their expertise, experience, and judgment relating to pension administration software available in the marketplace and the process for procuring such software in an objective fashion designed to achieve the best fit between the software solution and SBRB's functional requirements. As requested, LRWL provides its views and advice based on more than 20 previous pension solution procurements supported by LRWL. Additional participation in other project activities may take place as mutually agreed upon by SBRB, the prime contractor, and LRWL.

LRWL is providing assistance in the preparation of the following deliverables:

- Final review and completion of the SBRB pension administration software RFP
- Descriptive materials and instructions for "generic" (pre-RFP) vendor demonstrations
- Planning and conducting vendor demonstrations
- RFP evaluation methodology and proposal scoring package
- Support for SBRB deliberations concerning vendor evaluations
- Final vendor demonstration scripts
- Participation in post-RFP vendor demonstrations
- Attendance at project meetings as requested.

¹ This effort is being performed on a subcontract basis.