



**Vermont Office of State Treasurer Retirement Division
(VRS)**

133 State Street, 2nd Floor
Montpelier, VT 05633-6200



Dates of Engagement
2004 – Present

Purpose / Objectives

- Needs assessment
- RFP development
- Procurement assistance
- Oversight project management and quality assurance

Nature of LRWL Services

LRWL is assisting VRS in the following areas:

- Conducting a comprehensive needs assessment relating to the implementation of a new integrated retirement solution
- Evaluation of the opportunity / feasibility of implementing document imaging capability and/or backfile conversion prior to the implementation of the new retirement solution
- Developing an RFP for imaging backfile conversion services and an interim in-house imaging capability
- Developing an RFP for a new integrated retirement solution, including document imaging and workflow management
- Providing assistance in conducting procurement activities related to both RFPs, including:
 - ✓ Facilitating bidders conferences
 - ✓ Preparing answers to bidder questions
 - ✓ Reviewing bidder proposals
 - ✓ Preparing questions / requests for clarification to be submitted to bidders
 - ✓ Attending bidder site visits / oral presentations
 - ✓ Preparing Product Demonstration Scenarios and attending bidder product demonstrations
 - ✓ Preparing evaluation methodologies and proposal scoring spreadsheets
 - ✓ Assisting in scoring bidder submissions
 - ✓ Supporting the Best and Final Offer (BAFO) cycle
 - ✓ Selection of top ranking bidders
 - ✓ Contract negotiations
- Leading the implementation kick-off.

The backfile conversion is completed, and the interim imaging solution is in production.

LRWL's current role is to ensure the success of the project by performing in an oversight project management and quality assurance capacity.