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 SECRETARY

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## *Correspondence Memorandum*

**Date:** November 17, 2023

**To:** Employee Trust Funds Board

**From:** Michelle Baxter, Director  
 Office of Enterprise Initiatives

**Subject:** Contract Extension: Transformation, Integration and Modernization  
 Consulting Services

**The Department of Employee Trust Funds (ETF) requests the ETF Board (Board) approve a one-month extension for the following ETF contract with The Segal Company: ETB0033 for Transformation, Integration and Modernization (TIM) Consulting Services, for the period January 1, 2024, through January 31, 2024.**

**Background**

Based on ETF’s recommendation, on December 1, 2011, the Board delegated authority to the ETF Secretary to solicit proposals from qualified firms to assist with technology upgrades and business process re-engineering, under Wis. Stat. § 40.03(1)(c), ([Ref. ETF | 12.01.11 | 4F](#)). In April 2012, ETF issued a Request for Proposals (RFP).

At its June 21, 2012, meeting, the Board approved the recommendation of ETF to award a contract to LRWL Incorporated (LRWL) through December 31, 2017, with the option for two, two-year extensions (through December 31, 2021), for consulting services associated with implementing a new benefit system (Ref. ETF | 06.21.12 | 6). On July 12, 2012, the Board entered into a contract with LRWL for the aforementioned services and contract term. In 2019, the Segal Company (Segal) assumed LRWL’s assets.

At its June 17, 2021 meeting, the Board approved ETF’s recommendation to extend the contract with Segal for the period of January 1, 2022, through December 31, 2023, to provide sustained project management oversight across ETF’s modernization projects, including assisting ETF with IAS contracting and implementation ([Ref. ETF | 06.17.21 | 4D](#)).

Work under the contract between ETF and Segal continues as ETF moves forward with the implementation of the insurance administration system (IAS). ETF requests a contract extension of one month so that Segal can continue to perform their oversight

Reviewed and approved by John Voelker, Secretary  
 Electronically Signed 11/27/2023

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role up to the first 'go, no go' decision point within the Insurance Administration System implementation project that is scheduled for January 30, 2024. Starting in February, Linea Solutions will begin providing the oversight role for the pension administration system project.

ETF recommends the Board approve a Segal contract extension for the period of January 1, 2024, through January 31, 2024.

Staff will be at the Board meeting to answer questions.