

Date: May 4, 2020

To: All Vendors

Subject: **Request for Information (RFI) ETJ0058 Master Data Management**

Questions Due: Friday, May 15, 2020

**Responses Due: Friday, June 5, 2020 by 2:00 PM CDT**

The Wisconsin Department of Employee Trust Funds (ETF) is issuing this Request for Information to solicit input from the marketplace regarding master data management software licensing, hosting, and implementation services.

The following attachments are included with this RFI document:

* Designation of Confidential and Proprietary Information Form
* MDM Data Questionnaire

Thank you in advance for your response.

Joanne Klaas

Contracts Specialist-Advanced

Department of Employee Trust Funds

(608) 261-7247

[ETFSMBProcurement@etf.wi.gov](mailto:ETFProcurement@etf.wi.gov)

**Wisconsin Department of Employee Trust Funds**

**Request for Information ETJ0058**

**Master Data Management**

## 1.0 Request for Information Introduction

The Wisconsin Department of Employee Trust Funds (ETF) administers various benefit programs available to state and local public employees. ETF works with nearly 1,500 employer partners and serves 622,000 employees and retirees. The purpose of this Request for Information (RFI) is to solicit information from qualified master data management software and implementation providers.

* 1. Responses to this RFI will not be returned and become ETF’s property upon submission to ETF.
  2. Responses are voluntary and shall not bind either the respondent or ETF in any way. This RFI is issued solely for information and planning purposes and does not constitute a solicitation.
  3. Responses to this RFI are not an offer and cannot be accepted by ETF to form a binding contract.
  4. Vendors are invited to submit questions to [ETFSMBProcurement@etf.wi.gov](mailto:ETFSMBProcurement@etf.wi.gov) by Friday, May 15, 2020. ETF will respond with answers to any questions submitted as soon as possible thereafter. Questions (deidentifying the vendor) and ETF answers will be published on ETF’s procurement website <https://etf.wi.gov/procurement>.
  5. Include any assumptions you make in your response.
  6. Responses to this RFI will be reviewed by ETF and may be used to determine if a vendor meets ETF’s needs and is available to collaboratively contract with through another entity. Providing a response to this RFI is not a prerequisite to submitting a proposal should ETF offer such an opportunity in the future. The contents of responses to this RFI will not be considered in the review or evaluation of future bids or proposals.
  7. ETF is not liable for any cost incurred by any vendor who responds to this RFI.
  8. ETF reserves the right to ask for clarification of any responses.

## Submitting a Response

* 1. **Proposer’s email submission may include one or both of the following (2) attachments:**
     1. **Attachment 1 containing your response in Microsoft Word/Microsoft Excel, and/or Adobe Acrobat 9.0 (or above) format. Attachment 1 must be labeled “[Vendor Name] RFI ETJ0058 Response.”**
     2. **Attachment 2 containing your response in Microsoft Word/Microsoft Excel, and/or Adobe Acrobat 9.0 (or above) format EXCLUDING or REDACTING all confidential and proprietary information/documents. Attachment 2 must be labeled “[Vendor Name] REDACTED RFI ETJ0058 Response.”**

**Note: ETF may need to electronically send your redacted materials to members of the public when responding appropriately to public records requests. In the event that there is a public records request regarding the RFI, your redacted file is the file that will be shared with requestors. Note that no matter what method you use to redact documents, ETF is not responsible for checking that the redactions match your submitted Designation of Confidential and Proprietary Information form. ETF is not responsible for checking that redactions, when viewed on-screen via electronic file, cannot be thwarted. ETF is not responsible for responding to public records requests via printed hard copy, even if the redactions you made are only effective on printed hard copy. ETF may post your redacted responses on ETF’s public website in exactly the same file format you provided to ETF, and ETF is not responsible if the redacted file is copied and pasted, uploaded, e-mailed, or transferred via any electronic means, and somehow loses its redactions in that process.**

* **Redact only material you/your company authored. For example, do not redact ETF’s question or statement in the RFI you are responding to, only your answer.**
* **Do not redact page numbers. Page numbers should remain visible at all times, even if the whole page is being redacted.**
* **List the redacted items on your Designation of Confidential and Proprietary Information form; sign the form only once. Add as many lines/pages to the form as necessary.**
* **Submission of a redacted form is at your discretion. A redacted version of the response does not need to be submitted**
  + 1. Include your completed and signed Designation of Confidential and Proprietary Information form.

**2.2 Vendors** can reference their response to the questions in the RFI ETJ0059 API/EM, planned for publication on May 11 if desired, as both RFIs have similar questions especially as it refers to non-functional requirements.

2.3 **Vendors** should provide separate pricing for RFI ETJ0059 API/EM and this RFI ETJ0058 MDM.  However, if there would be pricing incentives to purchasing both API/EM and MDM solutions together please indicate that in your response to both RFIs.

2.4 Responses are due not later than June 5, 2020 by 2:00 PM central time to [ETFSMBProcurement@etf.wi.gov](mailto:ETFSMBProcurement@etf.wi.gov)

## Information Requested

Please answer questions in the attached MDM Data Questionnaire.

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| ETF_logo_large |  | **STATE OF WISCONSIN**  **Department of Employee Trust Funds**  **Robert J. Conlin**  SECRETARY | 4822 Madison Yards Way  Madison, WI 53705-9100  P. O. Box 7931  Madison, WI 53707-7931  1-877-533-5020 (toll free) |

**ETJ0058 Request for Information**

**Master Data Management**

**Designation of Confidential and Proprietary Information**

The material my company has submitted in response to **RFI #ETJ0058** includes proprietary and confidential information that qualifies as a trade secret, as provided in §19.36(5), Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Public Records Law. As such, my company requests that certain pages of our response, as indicated below, be treated as confidential material and not be released without our written approval. I understand other information cannot be kept confidential unless it is a trade secret.

Trade secret is defined in §134.90(1)(c), Wis. Stats. as follows: “Trade secret” means information, including a formula, pattern, compilation, program, device, method, technique or process to which all the following apply:

* The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
* The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

Failure to include this form with your response may mean that all information provided as part of your response will be open to examination and copying. The state of Wisconsin (State) will consider other markings of confidentiality in your response to be insufficient. **If you are not including any confidential or proprietary materials with your response, please write “none” in the first row below and submit this form with your response.**

**My company requests the following documents/sections/pages of our response not be released:**

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| **Response Section/Attachment Name** | **Page #** | **Topic** |
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**Attach additional copies of this form if necessary.**

In the event the designation of confidentiality of the above-listed information is challenged, my company hereby agrees to provide legal counsel or other necessary assistance to defend the designation of confidentiality and to hold the State harmless for any costs or damages arising out of the State withholding the materials. My company agrees to hold the State harmless for any damages arising out of the release of any materials unless they are specifically identified above.

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| Vendor/Respondent/Company Name: | Click or tap here to enter text. |
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| Name & Title of Authorized Representative: | Click or tap here to enter text. |
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| Authorized Representative Signature: |  |
|  |  |
| Signature Date: | Click or tap here to enter text. |