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| ETF_logo_large | STATE OF WISCONSIN **Department of Employee Trust Funds**  **A. John Voelker**  SECRETARY | 4822 Madison Yards Way  Madison, WI 53705-9100  PO Box 7931  Madison WI 53707-7931  1-877-533-5020 (toll free)  Fax 608-267-4549  etf.wi.gov |

October 9, 2024

Linea Solutions, Inc.

4551 Glencoe Avenue, Ste. 140

Marina del Rey, CA 90292

Attn: Bradford Hodgson, Director of Proposals

Peter Dewar, President

Akio Tagawa, President & CEO

Sent via email to: [bhodgson@lineasolutions.com](mailto:bhodgson@lineasolutions.com); [pdewar@lineasolutions.com](mailto:pdewar@lineasolutions.com); [atagawa@lineasolutions.com](mailto:atagawa@lineasolutions.com)

Subject: Notice of Intent to Award a Contract; ETF RFP ETD0060 for IT Audits and Consulting

Linea:

The Director of the Wisconsin Department of Employee Trust Fund’s (ETF) Office of Internal Audit, with the authority of the Employee Trust Funds Board, has issued this intent to award the contract for Information Technology Audits and Consulting (RFP ETD0060) to Linea Solutions, Inc. The contract would commence on the date the contract is fully executed and extend through June 30, 2026, with the potential for an additional three (3), one-year periods through June 30, 2029, subject to successful contract negotiations between Linea and ETF. The bid abstract for this solicitation is attached.

Due to the time sensitive nature of an executed contract, ETF’s Office of Internal Audit may issue an intent to award to the evaluation committee’s next viable vendor if contract negotiations fail or extend beyond a reasonable period of time with Linea. ETF expects contract negotiations to make reasonable progress toward conclusion by mid-November 2024.

RFP Section 3.11 describes the Board’s policy for vendor procurement appeals. Should a vendor choose to appeal the intent to award decision herein, the vendor must provide the Department with notice of intent to appeal within five (5) business days of the date of this letter by emailing ETF at both ETFSMBProcurementAppeals@etf.wi.gov and ETFSMBProcurement@etf.wi.gov. Appeal letters must include the information specified in the Board’s Vendor Procurement Appeals Policy (attached) and be sent to the same email addresses above within ten (10) business days of the date of this letter.

This letter is only a notice of intent to contract and does not constitute a contractual commitment.

Respectfully,

**Beth**

Beth Bucaida, JD, MBA

Contracts Specialist-Advanced

Wisconsin Department of Employee Trust Funds

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

cc: - AJ Gallagher

* Baker Tilly
* BayInfotech
* CliftonLarsenAllen
* CyberForce
* Deloitte
* ERMProtect
* Eviden
* Forvis Mazars
* JANUS
* Jefferson Wells
* Protiviti
* Securance
* Weaver & Tidwell

- RFP Evaluation Committee

- ETF Procurement File, ETF Secretary’s Office, ETF Office of Legal Services

Attachments:

* Bid Abstract
* Vendor Procurement Appeals Policy

**Wisconsin Department of Employee Trust Funds**

**FINAL BID ABSTRACT**

**RFP ETD0060 for IT Audits and Consulting**

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **AJG** | **Baker Tilly** | **BayInfotech** | **CLA** | **CyberForce** | **Deloitte** | **ERMProtect** | **Eviden** | **Forvis Mazars** | **JANUS** | **Jefferson Wells** | **Linea** | **Protiviti** | **Securance** | **Weaver & Tidwell** |
| **General Score** | 169.41 | 209.41 | 210.00 | 224.12 | 182.35 | 193.53 | 199.41 | 185.29 | 219.41 | 215.88 | 204.71 | 208.82 | 190.00 | 211.18 | 228.24 |
| **Techl Score** | 101.79 | 298.57 | 331.54 | 300.36 | 250.90 | 239.07 | 308.60 | 291.40 | 333.33 | 311.83 | 249.10 | 349.10 | 256.99 | 282.80 | 315.77 |
| **Score** | 271.20 | 507.98 | **541.54** | 524.48 | 433.25 | 432.60 | 508.01 | 476.69 | **552.75** | 527.71 | 453.81 | **557.93** | 446.99 | 493.97 | **544.01** |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Cost Score** |  |  | 200 |  |  |  |  |  | 106 |  |  | 142 |  |  | 104 |
| **Total Score** |  |  | **742** |  |  |  |  |  | **659** |  |  | **700** |  |  | **648** |

**Notes:**

Only the cost proposals for the top four scoring vendors in the general and technical portion were reviewed and scored. Although BayInfotech received the highest overall score after the cost scores were added, the committee recommended Linea for the contract because Linea had scored better in the general and technical sections. There is no requirement to award the contract to the vendor who scored the most points.

**Vendor Procurement Appeals Policy**

**Contracting Authority: Employee Trust Funds Board - WIS. STAT. § 40.03(1)(c)**

**PHASE ONE: Notice of Intent to Appeal Received by a Board c/o ETF Secretary**

1. **The Board authorizes ETF staff to issue the “Intent to Award” to the successful bidder.**
2. **ETF staff issue the Intent to Award to the successful bidder and notify all firms who submitted a bid.**
3. **A vendor who wants to appeal the award MUST send a written notice indicating that the vendor intends to appeal the decision. The vendor must send the notice to the Board, c/o the secretary of ETF, within five business days after the Intent to Award notice is sent.**

**Notices must be emailed to:**

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

1. **Upon receiving the written intent to appeal from the vendor, the ETF secretary will forward the notice to all Board members.**

**PHASE TWO: Formal Appeal Received by the Board c/o ETF Secretary**

1. **Within 10 business days from the issuance of the Intent to Award, the vendor MUST submit the formal appeal in writing to the Board, c/o the secretary of ETF.**
2. **The appeal must state the contract number, detailed factual grounds for the objection to the contract award, and any violations of Chapter 40, Wisconsin Statutes.**
3. **The secretary will forward the formal appeal to the Board.**
4. **If the vendor withdraws the intention to appeal or does not follow up within ten business days with a formal appeal, the ETF secretary will notify the Board that the matter is adjudicated, and no Board action is required.**
5. **All communications and documentation will be maintained with the procurement file.**
6. **The ETF secretary will direct ETF general counsel and the ETF director of the Bureau of Budget, Contract Administration and Procurement to investigate the alleged violation of Chapter 40.**
7. **The secretary will forward the results of the investigation to the Board and include a recommendation to the Board as well as legal and factual support for the recommendation.**

**PHASE THREE: Board Decision**

1. **The Board will review the appeal and ETF’s recommendation.**
2. **The Board will render a decision. For most appeals, the options available to the Board are rescind the original Intent to Award and direct staff to issue the award to a different bidder, rescind the original Intent to Award and direct staff to terminate the procurement, or deny the appeal and proceed with implementing the original decision.**
3. **Following Board action, a written decision will be sent to the vendor. The vendor is allowed one appeal per procurement contract or process.**
4. **For appeals of procurement awards made under Chapter 40, the Board’s decision is final.**