



STATE OF WISCONSIN
Department of Employee Trust Funds
A. John Voelker
SECRETARY

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March 23, 2025

Elise Dallain
Vice President, U.S. Public Sector
Telus Health (US) Ltd.
250 Royall St., Suite 210W
Canton, MA 02021

Kate Perkins
Heywood Limited
Second Floor, 3 Barrington Road
Altrincham, UK WA141GY

Subject: Notice of Intent to Award, RFP ETE0061 Pension Administration System

Dear Ms. Dallain, Mr. May, and Ms. Perkins:

The State of Wisconsin Department of Employee Trust Funds (Department) hereby issues an intent to award a contract for a pension administration system pursuant to the Department's RFP ETE0061 to both Heywood Limited and Telus Health. Next, a proof of concept (POC) exercise will be conducted and successful contract negotiations with the best performing POC vendor, as permitted in RFP Section 3.10 Proof of Concept and Section 3.8 Contract Award.

Following successful initial contract negotiations, the Department intends to conduct a POC in the Fall of 2025 with each awarded vendor. The Department will provide both vendors the POC criteria.

After completion of the POC, the Department may proceed with the vendor deemed by the Department to have performed best in the POC exercise. There shall be an initial Contract term for the proof of concept, with an optional initial ten (10) year renewal with one vendor. The Department also retains a subsequent option to renew the Contract for an additional three, five-year terms and one-year (or shorter) extensions as necessary to transition services to another service provider during a transition plan.

As required in RFP Section 3.9, should a vendor choose to protest the intent to award decision herein, the vendor must provide the Department with notice of intent to protest within five (5) business days of the date of this letter by emailing ETFSMBProcurement@etf.wi.gov. Protest letters must be received by email within ten (10) business days of the date of this letter.

The Department is not obligated to contract with either party. This letter is only a notice of intent to award a contract and does not constitute a contractual commitment.

Respectfully,
Joanne Klaas
Contracts Specialist
Wisconsin Department of Employee Trust Funds
Email: ETFSMBProcurement@etf.wi.gov

bcc: - RFP Proposers: Telus Health, Sagitec Solutions, Heywood Limited
- RFP Evaluation Committee
- ETF Procurement File, ETF Secretary's Office, ETF Office of Legal Services

- Public Notice on ETF's website at <https://etf.wi.gov/node/37111>

FINAL ABSTRACT for ETF RFP ETE0061 Pension Administration System

	Appendices 8, 6B, 7B	Appendices 5A, 6A, 7A	Cost (200 points)	BAFO Cost Score (200 points)	TOTAL SCORE	Rank
Heywood	Auto-Score (50 + 222 + 110 = 382) 349.39	Essay (150 + 128 + 140 = 418) 324.33	183.73	200.00	873.72	1
Sagitec	368.88	299.84	N/A		668.72	3
Telus	367.29	308.54	200.00	195.94	871.77	2