

Information Technology Services

August 2026

REQUEST FOR QUALIFICATIONS – QUESTIONS & ANSWERS



IIINFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

QUESTION	ANSWER
1. How does OCERS anticipate engaging vendors selected for the IT Vendor Bench (e.g., task orders, competitive quotes, direct assignments, or other methods)?	OCERS anticipates soliciting quotes or proposals from qualified bench vendors as specific needs arise. OCERS will select the vendor that best serves OCERS' interests for the particular engagement, considering qualifications, availability, proposed approach, cost, and other relevant factors. OCERS does not anticipate a rotational assignment process.
2. For the Managed IT Services & IT Support Services category, can OCERS provide any insight into the anticipated demand for operational support, staff augmentation, and/or project-based services during the first 12-24 months of the agreement?	OCERS has not established a forecast of demand or task volume by service category for the first 12–24 months. The purpose of this RFQ is to establish a broad bench of qualified vendors that OCERS may use on an as-needed basis as operational needs, projects, priorities, and funding are identified.
3. OCERS' strategic plan references initiatives involving cloud migration, Microsoft 365/Copilot, Microsoft Fabric, cybersecurity modernization, and Pension Administration System modernization. Which of these initiatives are anticipated to require support from firms selected to the IT Vendor Bench?	The initiatives and service areas identified in the RFQ, and OCERS' Strategic & Business Plan reflect areas in which OCERS may require support. However, OCERS has not committed specific future work to the IT Vendor Bench and cannot predict which initiatives will result in assignments. Future work will be defined and solicited as needs arise.
4. For Managed IT Services engagements, does OCERS anticipate primarily onsite, hybrid, or remote service delivery, and are there any on-call or after-hours support expectations vendors should consider when developing staffing and rate structures?	Service-delivery requirements will depend on the specific engagement. OCERS may use onsite, remote, or hybrid delivery, as appropriate to the work. Any required onsite presence, travel, on-call coverage, after-hours work, or 24/7 support will be identified in the applicable request for quote/proposal or statement of work.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

5. Is there a current IT or cybersecurity vendor bench in place? If so, could you please provide the names of the incumbent vendors and confirm whether this RFQ is replacing, expanding, or refreshing the existing bench?	OCERS does not currently have an Information Technology Services vendor bench; therefore, there is no incumbent vendor, prior response, or associated pricing to provide. This is OCERS' first RFQ to establish such a bench.
6. Approximately how many vendors does OCERS expect to qualify overall and within each service category?	OCERS has not established a target number of firms to qualify overall or by category. Qualification decisions will depend on the SOQs received, the evaluation criteria in the RFQ, and OCERS' anticipated needs. OCERS may qualify multiple firms within a category.
7. How will future work be assigned among qualified vendors? Will OCERS issue competitive task orders, select vendors directly based on qualifications and availability, use a rotation process, or follow another method?	OCERS anticipates soliciting quotes or proposals from qualified bench vendors as specific needs arise. OCERS will select the vendor that best serves OCERS' interests for the particular engagement, considering qualifications, availability, proposed approach, cost, and other relevant factors. OCERS does not anticipate a rotational assignment process.
8. Could you please share the approximate annual spend, historical spend, or expected task-order volume under this contract, if available?	The initiatives and service areas identified in the RFQ reflect areas in which OCERS may require support. However, OCERS has not committed specific future work to the IT Vendor Bench and cannot predict which initiatives will result in assignments nor approximate annual spend or volume. Future work will be defined and solicited as needs arise. OCERS' does not currently have an Information Technology Services vendor bench, and there is no incumbent vendor nor relevant historical spend or volume. This is OCERS' first RFQ to establish such a bench.
9. Which service categories does OCERS anticipate will have the highest demand during the first one to two years of the contract?	OCERS has not established a forecast of demand or task volume by service category for the first 12–24 months. The purpose of this RFQ is to establish a broad bench of qualified vendors that OCERS may use on an as-needed basis as operational needs, projects, priorities, and funding are identified.
10. The RFQ references Microsoft Azure, Microsoft Fabric, Microsoft 365, SharePoint, Power BI, SQL Server, Oracle, Java, and Oracle	The technologies listed in the RFQ are representative of OCERS' current environment and/or technologies for which OCERS may require services. OCERS currently operates a mixed technology environment that includes

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

WebLogic. Could you please confirm which of these technologies are currently in production and which are planned for future implementation?	Microsoft and Oracle/Java technologies. The RFQ should not be interpreted as a commitment to a particular future-state architecture or migration path; specific technical environments and requirements will be provided with future scopes of work as applicable.
11. Will future assignments be performed onsite, remotely, or through a hybrid arrangement? Are there any service categories that will require onsite presence or 24/7 support?	Service delivery requirements will depend on the specific engagement. OCERS may use onsite, remote, or hybrid delivery, as appropriate to the work. Any required onsite presence, travel, on-call coverage, after-hours work, or 24/7 support will be identified in the applicable request for quote/proposal or statement of work.
12. Are respondents expected to identify committed personnel for each selected service category in the SOQ, or may personnel be proposed at the task-order stage?	Please reference Section 7, Statement of Qualifications Requirements, number 4.
13. Are three references required for the overall SOQ, or are three references required for each service category? May the same reference be used across multiple service categories?	Three (3) references are required for each category for which respondent is seeking qualification. Same references can be utilized across multiple service categories if applicable.
14. Will the submitted rate card remain fixed for the duration of the contract, or may pricing be negotiated for individual task orders? Will annual rate adjustments be permitted?	Please reference Section 7, Statement of Qualifications Requirements, number 7.

15. GenSigma is a small, minority-owned business and currently carries \$3 million per occurrence in Fidelity Insurance. Would OCERS consider accepting this limit for lower-risk IT service assignments, or confirm whether the \$5 million per occurrence Fidelity Insurance requirement is mandatory for all awarded vendors?	The draft OCERS Services Agreement requires Fidelity Insurance with employee dishonesty coverage of not less than \$5,000,000 per occurrence. Respondents should identify any requested exception or alternative in their SOQ in accordance with Section 11. Any modification would be subject to OCERS' review and approval during contract negotiations.
16. Could you please provide the anticipated timeline for interviews, vendor selection, contract negotiations, and contract execution?	The timeline will be determined after the submission deadline and will depend on the number of proposals received.
17. Can OCERS provide an extension to the deadline and the Q&A period so that we can provide a more comprehensive set of questions in the time allotted.	The Q&A period was extended to August 17, 2026, at 5:00pm to allow for additional questions.
18. Regarding the References - Are three references required for each category we are responding to - or just a total of 3 references? If we need three references per category - can we utilize the same reference(s) across the different categories.	Three (3) references are required for each category for which respondent is seeking qualification. Same references can be utilized across multiple service categories if applicable.
19. Will OCERS accept references for clients who can't be named publicly (i.e., sanitized description now, name and POC on request)?	OCERS prefers references that can be verified during the evaluation process. If a client name is subject to a confidentiality restriction, the respondent may provide a sufficiently detailed sanitized description and explain the restriction but should be prepared to provide information necessary for OCERS to validate the reference if requested and legally permissible.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

20. Could OCERS clarify what types of information it considers relevant for inclusion under Section 10, "Any other information that the respondent deems relevant to OCERS' selection process"?	The quoted language comes from Section 7, requirement no. 10. Respondents may include any additional information they believe is relevant to OCERS' evaluation and selection process under this RFQ.
21. With respect to Evaluation Criterion #7, "Other factors OCERS determines to be relevant," could OCERS please clarify what types of considerations may be evaluated under this category?	Any other factors that OCERS determines to be relevant to the RFQ.
22. Are electronic signature allowed?	Yes, electronic signatures are allowed.
23. Could OCERS please clarify how confidential information should be marked within the proposal (e.g., at the top of the page, next to the applicable section, etc.)?	Respondents may use any manner that clearly and conspicuously marks the specific information or portions of their SOQ they deem to be confidential. Please refer to Section 10.
24. "We noticed that the "Place eBid" section of the portal requires an authentication PIN to proceed. Could you please provide the PIN so that we can access and review the portal, and assess our ability to participate and submit a proposal in the future?"	Please contact PlanetBids vendor support by phone at (818) 992-1771 or online through the PlanetBids Support Page. Support is available Monday through Friday from 5:00 AM to 5:00 PM PST.
25. Under section 3. A description of the respondent, a cover letter, and an executive summary are requested; however, firms are also requested to provide an executive letter right after Attachment B. Could OCERS please clarify if firms should only provide the following in the same order: Attachment B, Cover Letter, and Executive Summary?	Please read Section 7, Statement of Qualification Requirements in its entirety which details what the SOQs must include.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

26. For the Sample project(s) or case studies (point g) required in section section 3. A description of the respondent, could OCERS please clarify if firms are allowed to provide overall samples/case studies that cover several categories? Or are firms required to separate the samples/case studies by category?	Yes. A project or case study may be used for more than one service category when it demonstrates relevant experience for each category. The respondent should clearly identify which categories and capabilities the example supports.
27. Could OCERS please confirm that firms are not required to provide three references per category they are bidding for?	Three (3) references are required for each category for which respondent is seeking qualification. Same references can be utilized across multiple service categories if applicable.
28. Are firms allowed to subcontract?	Respondents may propose subcontractors, which will be subject to OCERS' approval.
29. In the event firms are allowed to subcontract, could OCERS please confirm firms are allowed to use references and experience from services provided by a subcontractor in order to meet the requirements?	A respondent may describe relevant experience, qualifications, certifications, and personnel of proposed subcontractors or teaming partners, provided the respondent clearly identifies the party's role and distinguishes that experience from the respondent's own experience. References must be verifiable and relevant. OCERS will evaluate the overall proposed team and may consider the extent to which qualifications are held by the prime respondent versus a subcontractor.
30. Could OCERS kindly elaborate on how firms will be notified when services are required? Will emails with task orders or Scopes of Work be released throughout the contract duration?	OCERS will solicit quotes or proposals from qualified vendors and select the vendor that best serves OCERS' interests, considering availability, cost, and other relevant factors.
31. Considering this is a prequalification list, could OCERS please confirm if, at a task/purchase order level, firms will be allowed to add additional personnel and rates considering there is currently no fixed Scope of Work required?	Respondents should submit the personnel and rates they currently anticipate for providing services under the applicable category. OCERS may consider additional personnel, qualifications, and pricing as part of future projects, proposals, purchase orders, or tasks subject to negotiation and OCERS written approval. Please also see Exhibit C - OCERS Services Agreement, Article 2 Terms, section 2.4 Responsibilities of Contractor.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

32. For the rate card required, rather than project-based rates considering that no fixed Scope of Work/Project is defined, could OCERS please confirm if the rate card provided can be Not to Exceed hourly rates for potential professionals that may be used in engagements?	Please reference Section 7, Statement of Qualifications Requirements, number 7.
33. Could OCERS kindly confirm if firms are allowed to replace the key personnel for an equally qualified resource in the event they become unavailable at a task/purchase order level?	Additional personnel may be added only with prior written approval from OCERS. Please reference Exhibit C - OCERS Services Agreement, Article 2 Terms, section 2.4 Responsibilities of Contractor.
34. Sections 3. A description of the respondent and 4. Names and Qualifications of Staff request information of key staff. Could OCERS please clarify if firms are allowed to make a cross reference in one of the sections in order to avoid repetition of information?	Three (3) references are required for each category for which respondent is seeking qualification. Same references can be utilized across multiple service categories if applicable.
35. Sections 3. A description of the respondent and 4. Names and Qualifications Of Staff request information of key staff. Could OCERS kindly clarify that by "key personnel" they are referring to the key personnel who will perform the services directly for OCERS or the personnel who will oversee the contract?	This includes key personnel who will perform, manage, coordinate, or oversee contracted services.
36. Are firms allowed to use commercial references?	Yes. Commercial/private-sector references are acceptable if the work is relevant to the service category and the reference can be verified.
37. Is offshore work allowed?	Remote work within the United States may be permitted depending on the engagement. For services involving Personal Information, the DPA requires Personal Information to be stored and processed in the United States and prohibits access from outside the United States without OCERS' prior

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

	written consent. Any proposed offshore work or non-U.S. access must be disclosed and would require OCERS' prior written approval where applicable.
38. Is remote work inside the United States allowed?	Service delivery requirements will depend on the specific engagement. OCERS may use onsite, remote, or hybrid delivery, as appropriate to the work. Any required onsite presence, travel, on-call coverage, after-hours work, or 24/7 support will be identified in the applicable request for quote/proposal or statement of work.
39. Is staff required to work on-site?	Service delivery requirements will depend on the specific engagement. OCERS may use onsite, remote, or hybrid delivery, as appropriate to the work. Any required onsite presence, travel, on-call coverage, after-hours work, or 24/7 support will be identified in the applicable request for quote/proposal or statement of work.
40. What is the not-to-exceed (NTE) budget for this contract?	Because this RFQ establishes a pre-qualified bench and does not procure a defined body of work, OCERS has not established a not-to-exceed budget, guaranteed spend, or anticipated task-order volume for the bench or for individual vendors. Future engagements may be scoped, funded, and authorized separately.
41. Is OCERS looking for firms to source, vet, screen, and recruit the requested positions from the market or for firms to provide their inhouse personnel to perform the services?	Please reference Section 7, Statement of Qualifications Requirements, number 4.
42. May respondents use subcontractors and strategic partners for specific service categories, and if so, do they explicitly need to be called out for what service(s) they willing be performing?	Yes. Respondents may propose subcontractors but must clearly identify the specific work each subcontractor will perform.

43. Will standard public-sector cooperative contract pricing (e.g., OMNIA/NASPO) be accepted in lieu of a standalone category-by-category rate card?	Respondents should provide a rate card with hourly and, where reasonably available, project-based rates for each applicable category, together with the pricing explanation required by Section 7, item 7. OCERS recognizes that specific project pricing may depend on a future scope of work and may request or negotiate engagement-specific pricing when work is solicited. Alternative pricing methods may also be proposed and explained.
44. Can a respondent be selected for only certain categories while not being qualified for others?	Yes, please see section 7, Statement of Qualifications Requirements, number 3.b. Respondent is to outline categories within the Scope of Services for which the respondent is seeking qualification.
45. Could OCERS confirm whether all the requirements included under Section 7 have to be consolidated in a single PDF?	SOQs may be submitted electronically in Microsoft Word or Adobe Acrobat PDF format.
46. "The DPA §13 references matters not subject to the Agreement's aggregate liability cap; however, the supplied Services Agreement does not appear to contain such a cap. Please confirm whether a limitation-of-liability provision was omitted and provide the intended language."	The general form of OCERS Services Agreement and DPA are provided to Respondents for review pursuant to Section 11 of the RFQ. The terms of a final Service Agreement and DPA may or may not contain reference to a cap.
47. "Please confirm the required cyber limits for services involving Customer Data, cloud, hosted or SaaS technology given the RFQ's \$2M/\$5M requirement and Agreement §2.7.2's \$5M/\$10M requirement."	The draft Services Agreement controls the insurance requirements for a resulting contract. Section 2.7.2 requires Cyber Security Liability coverage of not less than \$2,000,000 per occurrence and \$5,000,000 annual aggregate and permits required limits to be satisfied through a combination of primary and umbrella/excess coverage subject to the Agreement's requirements. Any engagement-specific changes will be addressed in the applicable contract or amendment.
48. Please identify which required policies must name OCERS as an additional insured, particularly Professional Liability, Cyber, Workers' Compensation and Fidelity coverage.	All coverages shall name OCERS as additional insured as stated in Section 3, Scope of Services.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

49. Following qualification to the IT Vendor Bench, how does OCERS anticipate assigning work: direct task order, mini-competition among qualified firms, rotational process, or another method?	OCERS will solicit quotes or proposals from qualified vendors and select the vendor that best serves OCERS' interests, considering availability, cost, and other relevant factors.
50. Are SOQ rate-card prices expected to remain fixed for the entire potential six-year term, or may respondents propose annual escalation/indexation?	Please reference Section 7, Statement of Qualifications Requirements, number 7.
51. OCERS Board materials reference development of a separate Data Services RFP for Horizon PAS data preparation/conversion. Please clarify whether such Horizon data-conversion services are excluded from, may also be procured under, or are otherwise related to this IT Vendor Bench.	The IT Vendor Bench is a separate procurement vehicle from any procurement specifically issued for the Horizon PAS modernization or data-conversion effort. Qualification to this bench does not guarantee work on Horizon. OCERS may use the bench for related IT services when appropriate, but any future scope, procurement method, dependencies, and technical requirements will be communicated separately.
52. Will OCERS accept standard exclusions from Work Product for pre-existing technology, methodologies, reusable tools, templates, utilities and generalized know-how, while receiving appropriate rights to materials incorporated into OCERS-specific deliverables?	Respondents should review Sections 2.9.1 through 2.9.3 of the draft Services Agreement regarding Work Product and preexisting intellectual property. If a respondent requires exclusions or different licensing terms for pre-existing technology, methodologies, tools, templates, utilities, or know-how, it should identify the requested modification and propose language in its SOQ in accordance with Section 11.
53. For cloud, SaaS and VAR services, may identified publisher/cloud-provider EULAs or product-specific terms be incorporated by signed task order/amendment notwithstanding §3.16?	Publisher, cloud-provider, SaaS, or other third-party terms are not automatically incorporated into the OCERS agreement. If particular product-specific terms are necessary for a future engagement, they must be disclosed and are subject to OCERS' review and written approval through the applicable contract, task order, or amendment.
54. Does DPA §11 prohibit all support or administrative access by personnel outside the United States, and may approved non-U.S. support locations be identified in Schedule 1?	Remote work within the United States may be permitted depending on the engagement. For services involving Personal Information, the DPA requires Personal Information to be stored and processed in the United States and prohibits access from outside the United States without OCERS' prior

IINFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

	written consent. Any proposed offshore work or non-U.S. access must be disclosed and would require OCERS' prior written approval where applicable.
55. For hyperscalers and SaaS platforms using standardized subprocessors, will OCERS accept a maintained subprocessor list and advance-change notification process in satisfaction of DPA §8?	DPA Section 8 requires OCERS' prior written approval of subprocessors that process Personal Information and at least 30 days' prior written notice of proposed changes. A maintained subprocessor list and change-notification process may be used operationally if it satisfies those requirements; it does not replace OCERS' approval and objection rights under the DPA.
56. Does the one-business-day recovery warranty in Agreement §2.4.11 apply to all consulting/staff-augmentation services, or only to operational/hosted services for which service continuity is applicable?	Section 2.4.11 applies to the Services a contractor provides to OCERS under the Agreement. The practical application of the one-business-day recovery requirement will depend on the nature of the services being performed. Respondents that believe the requirement is not applicable or requires modification for a particular service model should identify the requested exception in the SOQ in accordance with Section 11.
57. Does OCERS have an anticipated number of firms it expects to qualify overall or in each service category?	OCERS has not established or published a target number of firms to be qualified either overall or within any particular service category. OCERS intends to establish a bench of qualified providers based on the responses received and OCERS' evaluation of those responses.
58. Do you envision having additional submission opportunities in September and October for this solicitation (i.e., the RFQ for the bench of vendors will reopen every 30 days over the next two months)?	OCERS cannot speculate as to the need to reopen this RFQ or open similar RFQs in the future and can only speak to respondents' opportunity to respond to the instant RFQ under its published timeline.
59. Must all cybersecurity services (delivery/managed) be delivered by the recipient or can they be delivered through our established partner ecosystem (including OEM's, managed service providers, etc)?	Respondents may propose subcontractors, teaming partners, OEMs, managed service providers, or other partners where appropriate. The respondent must clearly identify the proposed party and the services or responsibilities it would perform. The prime contractor remains responsible for performance and compliance with the resulting agreement.
60. How would you like us to share what portion of the sub category we do and don't do? How granular do we need to be? Can we still	Respondents may seek qualification for one or more service categories and are not required to seek qualification for every category. Within a selected category, respondents should clearly identify the specific services/sub-

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

respond to a category if we don't do all the bullets in the category. Section 7, paragraph 3.C, page 7.	areas they provide and any services/sub-areas they do not provide. OCERS may qualify a respondent based on the capabilities demonstrated for the services identified in its SOQ.
61. Can you define what you mean by Key Personnel? Section 7, Paragraph 3.F, page 7.	Key personnel are individuals who will perform, manage, coordinate, or oversee contracted services.
62. We are planning on sending 3 references. Would that suffice if we plan on submitting more than one category? Section 7, Paragraph 5, page 7.	Three (3) references are required for each category for which respondent is seeking qualification. Same references can be utilized across multiple service categories if applicable.
63. Can you share examples of the current systems and use cases that would drive the work services for this category? Exhibit A, Section 1.A, Page 11.	The service descriptions in Exhibit A are intended to identify the types of capabilities OCERS may need and are not tied to a predetermined list of projects or use cases. OCERS does not have defined future work for every listed service area at this time. Specific systems, use cases, objectives, and technical requirements will be provided when individual work is solicited.
64. Can you share examples of the current systems / IoT device use cases that would drive the work services for this category? Exhibit A, Section 1D, page 12.	The service descriptions in Exhibit A are intended to identify the types of capabilities OCERS may need and are not tied to a predetermined list of projects or use cases. OCERS does not have defined future work for every listed service area at this time. Specific systems, use cases, objectives, and technical requirements will be provided when individual work is solicited.
65. Please describe your current state Sharepoint site and portal architecture(s) and desired future state SharePoint use cases and architecture. Are you using SharePoint or other types of CMS for Website, CMS, and Intra/Extranet. Exhibit A, Section 2A, page 12/.	OCERS uses Microsoft 365 and SharePoint as part of its collaboration environment. The RFQ includes potential services for SharePoint, intranet/extranet/portal development, content migration, governance, Power Platform, Copilot, and related digital-workplace capabilities. OCERS has not defined a single future-state architecture or committed scope under this RFQ; detailed current-state information and desired outcomes will be provided for specific engagements as needed.
66. Can you share examples of the current systems and java development use cases that would drive the work services for this category? Exhibit A, Section 3k, page 12.	The service descriptions in Exhibit A are intended to identify the types of capabilities OCERS may need and are not tied to a predetermined list of projects or use cases. OCERS does not have defined future work for every listed service area at this time. Specific systems, use cases, objectives, and

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

	technical requirements will be provided when individual work is solicited.
67. What aspects of your cybersecurity needs require consulting/implementation services versus managed services? This question applies especially for the Section 4.L (Email and Messaging Security), but is applicable to all cybersecurity areas. Exhibit A, Section 4, page 12.	OCERS may require both consulting/implementation services and managed services across cybersecurity areas. The RFQ intentionally includes a broad range of capabilities because future needs are not yet defined. The mix of advisory, implementation, project support, staff augmentation, and ongoing managed services will be specified for each future engagement.
68. Can you share examples of the current systems and use cases that would drive the work services for this category? Exhibit A, Section 11, page 12.	The service descriptions in Exhibit A are intended to identify the types of capabilities OCERS may need and are not tied to a predetermined list of projects or use cases. OCERS does not have defined future work for every listed service area at this time. Specific systems, use cases, objectives, and technical requirements will be provided when individual work is solicited.
69. General question - For firms proposing multiple service categories, does OCERS prefer a separate response section and case studies for each category, or a consolidated capabilities discussion covering multiple categories?	Please refer to Section 7, Statement of Qualifications Requirements, number 3, c. SOQ should have detailed description of capabilities, relevant experience and services offered for each applicable category.
70. General Question - Does OCERS anticipate engaging multiple firms for each service category, or selecting a single preferred provider per category?	Award of contracts will depend on the evaluation of SOQs and the Information Technology Department's needs as they arise.
71. General Question - Will OCERS evaluate respondents based solely on category-specific qualifications, or also on the ability to provide integrated services across multiple categories?	OCERS may take into consideration any factors it determines to be relevant.
72. Background & Context - Can you please elaborate on high level application	The technologies listed in the RFQ are representative of OCERS' current environment and/or technologies for which OCERS may require services.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

architecture and key systems /vendors	OCERS currently operates a mixed technology environment that includes Microsoft and Oracle/Java technologies. The RFQ should not be interpreted as a commitment to a particular future-state architecture or migration path; specific technical environments and requirements will be provided with future scopes of work as applicable.
73. Background & Context - What the travel or in-office requirements for the IT support staff deployed on the projects	Service-delivery requirements will depend on the specific engagement. OCERS may use onsite, remote, or hybrid delivery, as appropriate to the work. Any required onsite presence, travel, on-call coverage, after-hours work, or 24/7 support will be identified in the applicable request for quote/proposal or statement of work.
74. Background & Context - What are the type of projects covered under this SOQ - are these mostly new development, enhancement of existing applications, re-engineering etc	The bench may be used for new development, enhancements, modernization/re-engineering, integrations, migrations, operational support, staff augmentation, assessments, and other services within the categories listed in Exhibit A. OCERS has not established a fixed project mix or guaranteed pipeline.
75. Background & Context -Which technology initiatives are currently the highest priority for OCERS over the next 12-24 months (e.g., Microsoft 365 modernization, AI adoption, enterprise application modernization, cybersecurity, data and analytics, or digital workplace transformation)?	The initiatives and service areas identified in the RFQ reflect areas in which OCERS may require support. OCERS has not committed specific future work to the IT Vendor Bench and cannot predict which initiatives will take priority. Future work will be defined and solicited as needs arise.
76. Consulting & Strategy Services - In Scope of Services Exhibit A, Section 8, Bullet Point #5 - Can you please expand on the potential need in the 'portfolio management' space?	Potential portfolio-management needs may include assistance with IT project/initiative intake, prioritization, governance, roadmap alignment, resource and dependency visibility, portfolio reporting, benefits/value tracking, and related advisory support. No specific portfolio-management engagement is currently committed under this RFQ.
77. Data & Analytics Services - Some requirements, such as database administration (security, patching, backup/recovery, SSL renewals, and the like)	OCERS may require both project-based DBA work and ongoing operational support. The need may include design/configuration, upgrades or migrations, security and patching, monitoring, performance tuning, backup/recovery, certificate-related work, and other DBA services. The

IINFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

are ongoing or BAU type of services. Is there a need for only initial configuration of these activities or ongoing support?	duration and support model will be defined in each future scope.
78. Data & Analytics Services - How much of your operational needs are Oracle/Java based versus Microsoft (MS) based? Is there a future state of migrating to MS tools or remaining split between both MS and Oracle platforms? Note: May be answered in #4 above.	The technologies listed in the RFQ are representative of OCERS' current environment and/or technologies for which OCERS may require services. OCERS currently operates a mixed technology environment that includes Microsoft and Oracle/Java technologies. The RFQ should not be interpreted as a commitment to a particular future-state architecture or migration path; specific technical environments and requirements will be provided with future scopes of work as applicable.
79. Artificial Intelligence, Automation and Integration Services - Is OCERS primarily interested in strategic advisory services, implementation services, or both?	OCERS may seek both strategic advisory and implementation services for AI, automation, and integration. Potential needs include readiness and governance, use-case identification, architecture, Power Platform/Power Automate solutions, integrations/APIs, AI-enabled productivity, data/analytics use cases, security, adoption, and change management. No specific project is guaranteed under this RFQ.
80. Java Development Services - Does OCERS anticipate new application development, modernization of existing applications, API development, system integrations, or all of the above?	OCERS may use the bench for new Java development, modernization and enhancement of existing applications, API and integration work, troubleshooting, upgrades, and related Java/WebLogic services. Specific requirements will be defined in future scopes.
81. What are OCERS' top three strategic technology initiatives for the next 12-24 months?"	Broadly speaking, OCERS technology initiatives will align with and promote OCERS' Strategic Business Plan, which is available at: https://www.ocers.org/about-ocers
82. Are significant cloud, application modernization, or data modernization initiatives planned?	Broadly speaking, OCERS technology initiatives will align with and promote OCERS' Strategic Business Plan, which is available at: https://www.ocers.org/about-ocers

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

83. "What are OCERS' current priorities regarding AI, automation, and Microsoft Copilot adoption?"	OCERS is evaluating and planning for AI-enabled capabilities, including Microsoft Copilot and related productivity tools, with attention to governance, security, data protection, readiness, adoption, and implementation. The RFQ does not commit OCERS to a any specific deployment or timeline; future needs may include advisory and/or technical implementation services.
84. Which service categories are expected to generate the greatest demand during the first 24 months?	OCERS has not established a forecast of demand or task volume by service category for the first 12–24 months. The purpose of this RFQ is to establish a broad bench of qualified vendors that OCERS may use on an as-needed basis as operational needs, projects, priorities, and funding are identified.
85. "Approximately how many vendors does OCERS intend to qualify in each category?"	Award of contracts will depend on the evaluation of SOQs and the Information Technology Department's needs as they arise.
86. "How will work be assigned among qualified bench vendors?"	OCERS will solicit quotes or proposals from qualified vendors and select the vendor that best serves OCERS' interests, considering availability, cost, and other relevant factors.
87. "Are there incumbent providers currently supporting any listed categories?"	OCERS does not currently have an Information Technology Services vendor bench; therefore, there is no incumbent vendors. This is OCERS' first RFQ to establish such a bench.
88. "What characteristics distinguish the highest-scoring respondents beyond basic qualification requirements?"	Please reference Section 8, Evaluation Criteria, for clarification.
89. "How important is experience supporting public pension systems and government entities in the evaluation process?"	Please reference Section 8, Evaluation Criteria for clarification.
90. "Does OCERS prefer vendors capable of providing integrated services across multiple categories versus niche service providers?"	OCERS may take into consideration any factors it determines to be relevant.
91. "Are there any specific permits and licenses required to perform the services?"	Respondents are responsible for maintaining all licenses, permits, certifications, and authorizations legally required for their proposed services.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

92. "How is the contract negotiation process being handled? Is OCERS open to proposed revisions, or would you prefer that we submit any requested changes now as separate questions for consideration?"	Please see Section 11, Contract Negotiations for clarifications.
93. For Category 4 (Sub-Areas A–BB), may respondents bid on a defined subset of sub-areas reflecting their specific areas of specialization, or must every bidder commit to delivering services across the full A–BB range? Allowing sub-area-specific qualification is consistent with how many public-sector cybersecurity procurements are structured and may help OCERS secure the strongest available specialist in each individual sub-area.	Respondents may seek qualification for one or more service categories and are not required to seek qualification for every category. Within a selected category, respondents should clearly identify the specific services/sub-areas they provide and any services/sub-areas they do not provide. OCERS may qualify a respondent based on the capabilities demonstrated for the services identified in its SOQ.
94. Is prevailing wage compliance (Labor Code §1720 et seq.) intended to apply to cybersecurity advisory and consulting services, or is that provision aimed only at construction/maintenance-type work under this bench?	Purely advisory or consultation services for cybersecurity generally fall outside the definition of "Public Works" under Labor Code section 1720. To the extent prevailing wage law applies to any contracted services, respondents are required to comply with applicable law.
95. Exhibit B's Fee Schedule leaves the total compensation cap as "[TBD]." Is there an anticipated not-to-exceed value per category, or per awarded vendor, that respondents should price against?	Because this RFQ establishes a pre-qualified bench and does not procure a defined body of work, OCERS has not established a not-to-exceed budget, guaranteed spend, or anticipated task-order volume for the bench or for individual vendors. Future engagements may be scoped, funded, and authorized separately.
96. For the pricing-parity representation, is a general commercial-model description (e.g., subscription tiers, standard discounts) acceptable, or does OCERS require a line-by-line comparison against specific comparable public-fund contracts?	Please reference Section 7, Statement of Qualifications Requirements, number 7.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

97. Can OCERS confirm if the cyber liability insurance threshold (\$5M per occurrence, \$10M annual aggregate) applies to all Category 4 work, given the category is likely to involve Customer Data or hosted/cloud/SaaS services?	The draft Services Agreement controls the insurance requirements for a resulting contract. Section 2.7.2 requires Cyber Security Liability coverage of not less than \$2,000,000 per occurrence and \$5,000,000 annual aggregate, and permits required limits to be satisfied through a combination of primary and umbrella/excess coverage subject to the Agreement's requirements. Any engagement-specific changes will be addressed in the applicable contract or amendment.
98. Is OCERS willing to accept a \$5M aggregate for bids on Category 4. Please also confirm if OCERS will accept layered coverage (as indicated in 2.7.2.G)?	The draft Services Agreement controls the insurance requirements for a resulting contract. Section 2.7.2 requires Cyber Security Liability coverage of not less than \$2,000,000 per occurrence and \$5,000,000 annual aggregate, and permits required limits to be satisfied through a combination of primary and umbrella/excess coverage subject to the Agreement's requirements. Any engagement-specific changes will be addressed in the applicable contract or amendment.
99. For the AI disclosure requirement, what is the expected format and timing for disclosing AI tools used in service delivery — at SOQ submission, at contract execution, or on an ongoing basis as tools change?	The AI disclosure and approval requirement applies before an AI system or ADMT is used in performing services or processing OCERS data. The written disclosure should identify the system, provider, intended use, categories of data processed, and any subprocessors. Approval is required before use, and material changes or new AI tools should be disclosed and approved before deployment.
100. Is there an existing, expiring IT/cybersecurity vendor bench, or an incumbent provider, for any of the 12 categories in this RFQ?	OCERS does not currently have an Information Technology Services vendor bench; therefore, there is no incumbent vendor, prior response, or associated pricing to provide. This is OCERS' first RFQ to establish such a bench.
101. How does this RFQ's timeline relate to OCERS' concurrent Horizon PAS Modernization Project — will PAS vendor selection affect the technical environment or integration expectations for Category 4 awardees?	The IT Vendor Bench is a separate procurement vehicle from any procurement specifically issued for the Horizon PAS modernization or data-conversion effort. Qualification to this bench does not guarantee work on Horizon. OCERS may use the bench for related IT services when appropriate, but any future scope, procurement method, dependencies, and technical requirements will be communicated separately.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

102. Does the \$5,000,000 Fidelity Insurance requirement apply to all vendors and service categories, including IT professional services and staff augmentation firms that do not have custody or control of OCERS funds or financial assets?	The draft OCERS Services Agreement requires Fidelity Insurance with employee dishonesty coverage of not less than \$5,000,000 per occurrence. Respondents should identify any requested exception or alternative in their SOQ in accordance with Section 11. Any modification would be subject to OCERS' review and approval during contract negotiations.
103. Please confirm whether the higher Cyber Liability limits of \$5,000,000 per occurrence / \$10,000,000 aggregate apply only to engagements involving Customer Data, hosted/cloud services, or SaaS, rather than to all vendors selected for the IT Vendor Bench.	The draft Services Agreement controls the insurance requirements for a resulting contract. Section 2.7.2 requires Cyber Security Liability coverage of not less than \$2,000,000 per occurrence and \$5,000,000 annual aggregate, and permits required limits to be satisfied through a combination of primary and umbrella/excess coverage subject to the Agreement's requirements. Any engagement-specific changes will be addressed in the applicable contract or amendment.
104. Please confirm whether Certificates of Insurance and related endorsements are required with the SOQ submission, or only prior to commencement of work or upon OCERS' request.	This would be required upon contract award.
105. Does OCERS require full resumes with the SOQ, or are detailed key personnel biographies, qualifications, certifications, and experience summaries sufficient at the RFQ stage?	Please reference Section 7, Statement of Qualifications Requirements, number 4.
106. For respondents submitting for multiple service categories, may the same key personnel support more than one category when their experience is applicable to multiple categories?	Yes, same key personnel can be used for multiple categories as applicable.
107. For professional staffing and consulting services where future scopes are not yet defined, will OCERS accept hourly rates or rate ranges by labor category, with project-based	Please reference Section 7, Statement of Qualifications Requirements, number 7.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

pricing established for specific future engagements?	
108. May the same client reference or project case study be used for more than one service category when that engagement covered multiple relevant services?	Three (3) references are required for each category for which respondent is seeking qualification. Same references can be utilized across multiple service categories if applicable.
109. Will OCERS accept client references for work where the respondent performed the relevant services as a subcontractor to a prime contractor, provided the respondent clearly identifies its role and scope of work?	Yes. OCERS will accept references for engagements in which the respondent performed the relevant services as a subcontractor, provided the respondent clearly identifies its role, scope of work, and responsibilities on the engagement and demonstrates experience relevant to the service category for which qualification is sought. Respondents should clearly indicate that the work was performed as a subcontractor.
110. Is the written and tested Business Continuity Plan required to be submitted with the SOQ, or will it be required from selected vendors prior to commencement of work or upon request?	This would be required upon contract award.
111. Regarding Page 7, Section 7 (Rate card with hourly and project-based rates for each applicable category of service. An explanation of the pricing proposal for the scope of work, including pricing of fees and costs, billing practices, and payment terms that would apply. OCERS does limit the pricing approach to pricing and will consider alternative pricing methods for the scope of work, or portions of it. This section of the response should include an explanation as to how the pricing approach(es) will be managed to provide the best value to OCERS. The respondent should represent that the pricing offered to OCERS is,	Per Section 7, Statement of Qualifications Requirements, number 7, Rate card with hourly and project-based rates for each category should be provided, and OCERS will consider alternative pricing methods.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

and will remain, equivalent to or better than that provided to other public pension fund or institutional investor clients or explain why this representation cannot be provided. All pricing proposals should be “best and final,” although OCERS reserves the right to negotiate on pricing): As this is a Request for Qualifications (RFQ) where specific project scopes and deliverables are determined on a task-order basis, could OCERS clarify how respondents should present project-based rates? Alternatively, will project-based pricing be requested and evaluated on a per-project or per-Task Order basis once a specific scope of work is issued?	
112. Could OCERS clarify whether a respondent must demonstrate the capability to provide all services listed within a selected service category, or whether a respondent may seek qualification for only specific services or capabilities within a broader category?	Please see Section 3, Scope of Services, number 6 for clarification.
113. For categories that contain multiple subcategories or service areas, could OCERS clarify whether respondents may select individual subcategories or whether selecting the parent category requires demonstrating capability across all services listed under that category?	Respondents may seek qualification for one or more service categories and are not required to seek qualification for every category. Within a selected category, respondents should clearly identify the specific services/sub-areas they provide and any services/sub-areas they do not provide. OCERS may qualify a respondent based on the capabilities demonstrated for the services identified in its SOQ.
114. If a respondent is responding to multiple service categories, could OCERS clarify whether one consolidated SOQ may address all selected categories or whether separate	A respondent may submit one consolidated SOQ covering multiple service categories. Common organizational information may be provided once and cross-referenced, but the SOQ should clearly identify each category for which qualification is sought and provide a distinct, sufficiently detailed

IINFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

SOQs are required for each category?	description of capabilities, relevant experience, services offered, and other category-specific information required by Section 7 for each applicable category.
115. If one consolidated SOQ is permitted, could OCERS clarify whether a single cover letter and executive summary may address multiple categories, with separate category-specific sections for capabilities and experience?	Yes. A respondent may submit one consolidated SOQ. Separate cover letters or executive summaries do not need to be submitted for each category. However, submissions must comply with and contain information as required under Section 7.
116. Could OCERS clarify whether the respondent is expected to provide a separate description of qualifications, relevant experience, and services offered for each selected category, or whether common organizational information may be provided once and referenced across categories?	A respondent may submit one consolidated SOQ covering multiple service categories. Common organizational information may be provided once and cross-referenced, but the SOQ should clearly identify each category for which qualification is sought and provide a distinct, sufficiently detailed description of capabilities, relevant experience, services offered, and other category-specific information required by Section 7 for each applicable category.
117. Could OCERS clarify whether the same project or case study may be used to demonstrate experience across multiple categories when the project included services applicable to each category?	Yes. A project or case study may be used for more than one service category when it demonstrates relevant experience for each category. The respondent should clearly identify which categories and capabilities the example supports.
118. Could OCERS clarify whether the same reference may be used for multiple service categories when the referenced engagement included services relevant to those categories?	Three (3) references are required for each category for which respondent is seeking qualification. Same references can be utilized across multiple service categories if applicable.
119. The RFQ requires at least three references for which the respondent has provided services similar to those included in the Scope of Services. Could OCERS clarify whether commercial/private-sector client references are acceptable?	Yes. Commercial/private-sector references are acceptable if the work is relevant to the service category and the reference can be verified.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

120. Could OCERS clarify whether the three required references are required in total for the SOQ or whether three references are required separately for each service category for which the respondent seeks qualification?	Three (3) references are required for each category for which respondent is seeking qualification. Same references can be utilized across multiple service categories if applicable.
121. Could OCERS clarify whether references may include projects performed by proposed subcontractors or teaming partners, if subcontractors or teaming partners are permitted?	A respondent may describe relevant experience, qualifications, certifications, and personnel of proposed subcontractors or teaming partners, provided the respondent clearly identifies the subcontractor's/teaming partner's role and distinguishes that experience from the respondent's own experience. References must be verifiable and relevant. OCERS will evaluate the overall proposed team and may consider the extent to which qualifications are held by the prime respondent versus a subcontractor.
122. The RFQ requests key personnel bios and certifications and separately requests the names and qualifications of staff that will be assigned to OCERS work. Could OCERS clarify the distinction between "key personnel" and the "staff that will be assigned to OCERS work"?	This applies to key personnel who will perform, manage, coordinate, or oversee contracted services.
123. Could OCERS clarify whether the personnel identified in the SOQ are expected to be the specific individuals who will perform future assignments, or whether the SOQ may identify representative/key personnel while specific technical resources are proposed when an assignment is requested?	Please reference Section 7, Statement of Qualifications Requirements, number 4. Respondents should submit the personnel and rates they currently anticipate for providing services under the applicable category. OCERS may consider additional personnel, qualifications, and pricing as part of future projects, proposals, purchase orders, or tasks subject to negotiation and OCERS written approval. Please also see Exhibit C - OCERS Services Agreement, Article 2 Terms, section 2.4 Responsibilities of Contractor.
124. Given that the RFQ establishes a pre-qualified IT Vendor Bench for services to be provided on an as-needed basis, could OCERS	OCERS will solicit quotes or proposals from qualified vendors and select the vendor that best serves OCERS' interests, considering availability, cost, and other relevant factors.

IINFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

clarify when specific resources are expected to be identified and committed—at the SOQ stage, when an assignment is requested, or prior to commencement of each engagement?	
125. If personnel identified in the SOQ become unavailable at the time of a future assignment, could OCERS clarify whether the respondent may substitute personnel with equal or greater qualifications and relevant experience, subject to OCERS approval?	Additional or substitute personnel may be added only with prior written approval from OCERS. Please reference Exhibit C - OCERS Services Agreement, Article 2 Terms, section 2.4 Responsibilities of Contractor.
126. Could OCERS clarify whether resumes or detailed resumes are required for all personnel identified in the SOQ, or whether the requirement is limited to the key personnel bios and staff qualifications described in Section 7?	This applies to key personnel who will perform, manage, coordinate, or oversee contracted services.
127. Could OCERS clarify whether respondents may use subcontractors or teaming partners to provide services under one or more of the selected categories?	Yes. Respondents may propose subcontractors, teaming partners, OEMs, managed service providers, or other partners where appropriate. The respondent must clearly identify the proposed party and the services or responsibilities it would perform. The prime contractor remains responsible for performance and compliance with the resulting agreement.
128. If subcontractors or teaming partners are permitted, could OCERS clarify whether their relevant experience, qualifications, references, certifications, and personnel may be included in demonstrating the respondent's qualifications for a service category?	A respondent may describe relevant experience, qualifications, certifications, and personnel of proposed subcontractors or teaming partners, provided the respondent clearly identifies the party's role and distinguishes that experience from the respondent's own experience. References must be verifiable and relevant. OCERS will evaluate the overall proposed team and may consider the extent to which qualifications are held by the prime respondent versus a subcontractor.
129. The RFQ states that proof of the required insurance must be provided prior to commencement of work, on an annual basis,	This would be required upon contract award.

IINFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

and upon request. Could OCERS clarify whether proof of insurance is required as part of the SOQ submission or only after selection and prior to commencement of services?	
130. The RFQ requests hourly and project-based rates for each applicable category. Could OCERS clarify whether rates should be provided by service category, labor category/role, level of experience, or another pricing structure?	Per Section 7, Statement of Qualifications Requirements, number 7, Rate card with hourly and project-based rates for each category will be accepted as well as will consider alternative pricing methods.
131. Could OCERS clarify whether respondents should provide rates for every service listed within a selected category, or whether rates may be provided for the specific services for which the respondent is seeking qualification?	Per Section 7, Statement of Qualifications Requirements, number 7, Rate card with hourly and project-based rates for each applicable category of service.
132. Could OCERS clarify whether there is a page limit for the SOQ or for any individual section of the response?	The RFQ does not establish a page limit for the SOQ or for individual sections. Respondents should nevertheless keep submissions clear, concise, well organized, and responsive to the requirements in Section 7.
133. Could OCERS clarify whether respondents should provide separate attachments for each selected category or whether all category-specific materials should be incorporated into one consolidated SOQ?	A respondent may submit one consolidated SOQ covering multiple service categories. Common organizational information may be provided once and cross-referenced, but the SOQ should clearly identify each category for which qualification is sought and provide a distinct, sufficiently detailed description of capabilities, relevant experience, services offered, and other category-specific information required by Section 7 for each applicable category.
134. Could you please share the estimated budget for this RFP?	Because this RFQ establishes a pre-qualified bench and does not procure a defined body of work, OCERS has not established a not-to-exceed budget, guaranteed spend, or anticipated task-order volume for the bench or for individual vendors. Future engagements may be scoped, funded, and authorized separately.

135. Could you please share the incumbent vendor's name, their previous response, and associated pricing for a similar contract?	OCERS does not currently have an Information Technology Services vendor bench, and there is no incumbent vendor, prior response, or associated pricing to provide. This is OCERS' first RFQ to establish such a bench.
136. Could you please provide the annual spending details for similar contracts from the past three years?	OCERS does not currently have an Information Technology Services vendor bench; therefore, there are no spending details for similar contracts. This is OCERS' first RFQ to establish such a bench.
137. Can OCERS provide insight into the process around how future work will be solicited among selected vendors for each service category?	OCERS will solicit quotes or proposals from qualified vendors and select the vendor that best serves OCERS' interests, considering availability, cost, and other relevant factors.
138. Does OCERS anticipate selecting a target number of vendors within each category, or will awards be based solely on qualifications and best fit?	Award of contracts will be based on OCERS' evaluation of SOQs to determine which vendors will best serve OCERS' interests and needs.
139. May respondents submit one consolidated SOQ for multiple categories, and if so, does OCERS prefer separate sections by category?	A respondent may submit one consolidated SOQ covering multiple service categories. Common organizational information may be provided once and cross-referenced, but the SOQ should clearly identify each category for which qualification is sought and provide a distinct, sufficiently detailed description of capabilities, relevant experience, services offered, and other category-specific information required by Section 7 for each applicable category.
140. Because this RFQ appears to establish a bench rather than a specific scope award, what pricing format does OCERS prefer for evaluation purposes?	Per Section 7, Statement of Qualifications Requirements, number 7, Rate card with hourly and project-based rates for each category will be accepted, and OCERS will consider alternative pricing methods.
141. Can OCERS share which service categories it expects to utilize most during the first 12–18 months?	OCERS has not established a forecast of demand or task volume by service category for the first 12–18 months. The purpose of this RFQ is to establish a broad bench of qualified vendors that OCERS may use on an as-needed basis as operational needs, projects, priorities, and funding are identified.

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

142. Within Consulting and Strategy Services, which capabilities are of greatest current interest to OCERS?	OCERS has not established a priority scale within Consulting and Strategy services. The Consulting and Strategy category is intended to provide access to qualified firms across the capabilities listed in Exhibit A as needs arise, including strategy, governance, architecture, portfolio/project advisory, sourcing, risk/compliance, resilience, modernization, and executive advisory services.
143. Can OCERS provide additional guidance on the AI, automation, and integration use cases of greatest interest?	OCERS may seek both strategic advisory and implementation services for AI, automation, and integration. Potential needs include readiness and governance, use-case identification, architecture, Power Platform/Power Automate solutions, integrations/APIs, AI-enabled productivity, data/analytics use cases, security, adoption, and change management. No specific project is guaranteed under this RFQ.
144. Given the AI and ADMT provisions in the draft Services Agreement and Data Protection Addendum, can OCERS describe its expected review/approval process for AI-enabled tools or services, including Microsoft Copilot and similar capabilities?	The AI disclosure and approval requirement applies before an AI system or ADMT is used in performing services or processing OCERS data. The written disclosure should identify the system, provider, intended use, categories of data processed, and any subprocessors. Approval is required before use, and material changes or new AI tools should be disclosed and approved before deployment.
145. Does OCERS have preferred platforms for workflow automation and low-code/no-code services, such as Microsoft Power Platform, ServiceNow, UiPath, or others?	Microsoft Power Platform/Power Automate is specifically identified in the RFQ and is part of OCERS' Microsoft environment. OCERS may also consider other platforms where appropriate to a specific use case. OCERS may solicit future proposals or quotes from the selected vendor pool that may identify a required or preferred platform, integration, security, and governance constraints.
146. Can OCERS share the current state of its Microsoft 365 / collaboration environment and any known modernization priorities?	OCERS uses Microsoft 365 and SharePoint as part of its collaboration environment. The RFQ includes potential services for SharePoint, intranet/extranet/portal development, content migration, governance, Power Platform, Copilot, and related digital-workplace capabilities. OCERS has not defined a single future-state architecture or committed scope under this RFQ; detailed current-state information and desired outcomes

II INFORMATION TECHNOLOGY SERVICES REQUEST FOR PROPOSAL – QUESTIONS & ANSWERS

	will be provided for specific engagements as needed.
147. Does OCERS anticipate near-term interest in Microsoft Copilot or similar AI productivity tools, and if so, is the likely need more focused on readiness/governance/adoption or technical implementation?	OCERS is evaluating and planning for AI-enabled capabilities, including Microsoft Copilot and related productivity tools, with attention to governance, security, data protection, readiness, adoption, and implementation. The RFQ does not commit OCERS to a specific Copilot deployment or timeline; future needs may include advisory and/or technical implementation services.
148. For the VAR category, is OCERS primarily seeking procurement facilitation/reseller capabilities, bundled solution delivery with implementation support, or strategic sourcing/vendor management assistance?	OCERS may use the VAR category for one or more of the listed models, including procurement/reseller services, licensing and renewals, solution sourcing, and bundled products with related implementation or support where appropriate. OCERS has not established a single exclusive VAR service model; specific requirements will be defined for each future procurement.