



State of West Virginia
Agency Request for Proposals
Consulting

Proc Folder: 945944			Reason for Modification: Addendum #01 Addendum is for responding to vendor questions received by deadline.	
Doc Description: Savings Plans Consulting Services				
Proc Type: Agency Master Agreement				
Date Issued	Solicitation Closes	Solicitation No	Version	Phase
2021-10-14	2021-10-29 11:00	ARFP 1300 STO2200000002	2	Final

BID RECEIVING LOCATION

WEST VIRGINIA STATE TREASURERS OFFICE
322 70TH ST SE

CHARLESTON WV 25304
US

VENDOR

Vendor Customer Code:
Vendor Name :
Address :
Street :
City :
State : **Country :** **Zip :**
Principal Contact :
Vendor Contact Phone: **Extension:**

FOR INFORMATION CONTACT THE BUYER

Alberta Kincaid
(304) 341-0723
alberta.kincaid@wvsto.com

Vendor Signature X **FEIN#** **DATE**

All offers subject to all terms and conditions contained in this solicitation

INVOICE TO	SHIP TO
WEST VIRGINIA STATE TREASURERS OFFICE 322 70TH ST SE CHARLESTON WV 25304 US	WEST VIRGINIA STATE TREASURERS OFFICE 322 70TH ST SE CHARLESTON WV 25304 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	Consulting Services for Financial Savings Plans	500.00000	HOUR		

Comm Code	Manufacturer	Specification	Model #
80171906			

Extended Description:
See Attached Specifications / Cost Sheet for further details.

SCHEDULE OF EVENTS		
<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	Vendor Questions Due 3:30pm	2021-10-13

SOLICITATION NUMBER: ARFP STO2200000002

Addendum Number: 01

The purpose of this addendum is to modify the solicitation identified as ARFP STO2200000002 (“Solicitation”) to reflect the change(s) identified and described below.

Applicable Addendum Category:

- ☐ Modify bid opening date and time
- ☐ Modify specifications of product or service being sought
- ☒ Attachment of vendor questions and responses
- ☐ Attachment of pre-bid sign-in sheet
- ☐ Correction of error
- ☐ Other (Attach Purchasing Affidavit)

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Vendor Questions - Solicitation # ARFP STO2200000002
ADDENDUM #01

Q. 1 Please clarify the bid submission requirements and acceptable submission methods. Is electronic submission via email acceptable? If so, what email address may we use to submit our bid? If hard copies of the bid are required, how many copies must be submitted? Would you please also provide an addressee and phone number for that person?

A.1 Email submission is permissible if you choose to not send the response via US Postal Service, Courier, etc. If sending a response by email, then no additional courtesy copies will be required. Please review Section 5.4.1 of the Specifications for information on the file size limitation, identifying the email submission, etc.

The designated buyer for this procurement is Alberta Kincaid (304-341-0723) and may be reached via email at purchasing@wvsto.com / alberta.kincaid@wvsto.com

The email address for formal bid submission use is: BidsWVTreasury@wvsto.com

Additional information regarding bid submission may be found in Section 2: Instructions to Vendors Submitting Bids, item 6.

Q. 2 Will the STO provide an Addendum Acknowledgement Form template?

A. 2 The Addendum Acknowledgement Form is attached/included with this response packet.

Q. 3 In Subsection 4.5.1 (see highlighted excerpt at the bottom of this email), is item b. incomplete?
Possess a minimum of fifteen (15) years of college savings industry specific experience providing consulting services to state administrators of Section 529 college savings plans, including experience advising on

A. 3 Section 4.5.1, item b, has been revised and restated as follows:

b. Possess a minimum of fifteen (15) years of college savings industry specific experience providing consulting services to state administrators of Section 529 college savings plans, including experience advising on the development of new 529 or other savings plans.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: ARFP STO2200000002

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

<input checked="" type="checkbox"/> Addendum No. 1	<input type="checkbox"/> Addendum No. 6
<input type="checkbox"/> Addendum No. 2	<input type="checkbox"/> Addendum No. 7
<input type="checkbox"/> Addendum No. 3	<input type="checkbox"/> Addendum No. 8
<input type="checkbox"/> Addendum No. 4	<input type="checkbox"/> Addendum No. 9
<input type="checkbox"/> Addendum No. 5	<input type="checkbox"/> Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Company

Authorized Signature

Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.