

Addendum No. 1

Date: May 8, 2024
RFP No.: 2024-003
RFP Title: Investment Consulting Services
Contact: BERSProcurement@bers.nyc.gov

THIS ADDENDUM IS ISSUED FOR THE PURPOSE OF INCLUDING INSTRUCTIONS TO PROPOSERS REGARDING CONTACT PERTAINING TO THIS RFP. THIS ADDENDUM IS HEREBY MADE A PART OF SAID REQUEST FOR PROPOSALS TO THE SAME EXTENT AS THOUGH IT WERE ORIGINALLY THEREIN. UNLESS OTHERWISE INDICATED BELOW, ALL TERMS AND CONDITIONS OF THIS RFP REMAIN THE SAME. PROPOSERS MUST ACKNOWLEDGE RECEIPT OF ALL ADDENDA ISSUED AS INDICATED IN THIS RFP.

THE FOLLOWING SECTION HAS BEEN ADDED:

1) Instructions to Proposers

INSTRUCTIONS TO PROPOSERS

Contact for this RFP

This Request for Proposals (“RFP”) is issued by the NYC Board of Education Retirement System (“BERS” or the “Agency”).

Proposers are advised that from the date this RFP is issued until the award of the contract, NO contact with Agency personnel related to this solicitation is permitted, except via the e-mail designated below. Any inquiry regarding this solicitation must be made in writing. No telephone calls will be accepted regarding this RFP. All written inquires and all comments, questions, and correspondence regarding this RFP may be submitted via email to:

BERSProcurement@bers.nyc.gov

The subject line of email inquiries regarding this RFP must read: RFP 2024-003: Investment Consulting Services

The deadline for submitting questions on this RFP is **no later than 5:00 PM (EST) on Monday, 05/20/2024**. After this date/time, no further inquiries will be accepted.

Responses by BERS to all substantive inquiries will be addressed in a written Q&A document, which will be posted on (<https://www.bers.nyc.gov/site/bers/notices/requests-for-proposals.page>) **no later than Monday, 06/03/2024** as a formal addendum. Overall, the agency shall issue responses to inquiries related to substantive questions received plus any other corrections or amendments to the RFP it deems necessary prior to the RFP response Due Date. Please continue to check the website for updates.

Additional Information for Proposers

Except as noted, there shall be no communication between any responding vendor or prospective responding vendor and:

1. Any member of BERS' Board of Trustees or their staff members.
2. Any employee of BERS (except as outlined herein); or
3. Any persons in a perceived position to influence decisions of BERS at any time during the process, and until the Agency makes its decision, except at times specified for oral presentations by selected firms, if any.

Direct communication with those persons referenced above, either in person, writing, or by phone in regard to these specifications, the RFP response, or the eventual awarding of the contract (should a contract ultimately be awarded), shall result in the disqualification of the respondent.

BERS reserves the right, without prejudice, to reject any or all RFP responses submitted. BERS will not reimburse proposers for any expenses incurred in preparing their responses to this RFP.

ACKNOWLEDGMENT OF ADDENDA

The proposer is to complete either Part I or Part II of this form, whichever is applicable, and include the signed and dated form with their Proposal submission. This form serves as the Proposer's acknowledgment of the receipt of the Addenda to this Request for Proposals which may have been issued by BERS prior to the Proposal Due Date and Time.

Part I: Check here if applicable _____

Listed below are the dates of issue for each Addendum received concerning this Request for Proposals:

Addendum #1, dated: / /

Addendum #2, dated: / /

Addendum #3, dated: / /

Addendum #4, dated: / /

Addendum #5, dated: / /

Part II: Check here if applicable _____

No Addendum was received in connection with this Request for Proposals.

Proposer's Company Name:

Proposer's Authorized Named Representative:

Address: _____

Title: _____

Signature: _____ Date: _____