



Request for Proposals (RFP) Addendum 1

Enterprise Risk Management Study for the Purpose of Capital Modeling

CIS
30125 SW Kinsman Rd.
Wilsonville, OR 97070

RFP Schedule	
Issuance of RFP:	June 15, 2026
Submission of Questions about the RFP:	June 29, 2026, 5:00 p.m. (PT)
Proposal Due:	July 13, 2026, 5:00 p.m. (PT)
Anticipated Contract Award:	August 21, 2026
Effective Date:	August 24, 2026

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ADDENDUM

A. BACKGROUND

On June 15, 2026, CIS issued a Request for Proposals (RFP) to solicit offers from qualified vendors to perform capital modeling services and provide target ranges for our property, liability, workers' compensation programs and two employee benefits trusts.

CIS is issuing this Addendum to the RFP to extend the due date for submitting proposals. The Addendum modifies the original RFP document only to the extent indicated. All other areas of the original RFP remain in effect and can only be modified in writing by CIS. This Addendum is made an integral part of the original RFP. It is the responsibility of all proposers to conform to this Addendum. Proposers who have already submitted proposals may either: 1. Submit an addendum to their proposal; or 2. withdraw the original proposal and submit a new one. Any addendum or revised proposal must be submitted no later than the **Proposal Due Date of 5:00 p.m. (PT) on July 13, 2026.**

B. SECTION V ADDED TO RFP

Section V of the RFP was inadvertently left out of the document issued on June 15, 2026. The section is included below.

V. PROPOSAL FORMAT AND CONTENT

The proposal submitted in response to this RFP must contain the information required in Sections A through E below. Brevity is preferred. For the questions in Sections B through D, please precede your answers with a restatement of the question. If you intend to use any subcontractors in fulfillment of services, information should be furnished for both your firm and the subcontractors where appropriate.

Submitting general marketing materials about your firm in lieu of providing specific answers to questions will not be acceptable. If you wish to submit marketing materials, you should do so as a separate addendum rather than as part of the formal response.

A. COVER LETTER

All proposals must include a cover letter addressed to the **Contact Person** in Section III, B of the RFP. At a minimum, the cover letter must contain the following:

- Identification of the proposer, including business name, address, and telephone number.
- Name, title, address, telephone number, and e-mail address of a contact person during the period of proposal evaluation.

- Acknowledgment of RFP addenda received, if any.
- A statement that the proposal shall remain valid for a period of not fewer than **90 days** from the due date for proposals.
- Any exceptions to any specified criteria in this RFP.
- Identification of any information contained in the proposal which the proposer deems to be confidential or proprietary and wishes to be withheld from disclosure. A blanket statement that all contents of the proposal are confidential or proprietary will not be honored by CIS.
- Signature of a person authorized to bind the offering firm to the terms of the proposal.

B. QUALIFICATIONS, RELATED EXPERIENCE, AND REFERENCES

1. Furnish background information about your firm, including date of founding, legal form (i.e., sole proprietorship, partnership, LLC, corporation/state of incorporation), number and location of offices, principal lines of business, number of employees, days/hours of operation and other pertinent data. Disclose any conditions (e.g., bankruptcy or other financial problems, pending litigation, planned office closures, impending merger) that may affect your ability to perform contractually. Certify that the firm is not debarred, suspended, or otherwise declared ineligible to contract by any federal, state, or local public agency.
2. Describe your firm's experience and qualifications for providing capital modeling services.
3. Please provide references for whom you have provided capital modeling services.
4. Provide at least two case studies of providing the capital modeling services like those requested in the **Scope of Work**. Describe the services you offered and how they were beneficial to the client.

C. STAFFING AND PROJECT ORGANIZATION

Identify the key personnel from your firm who would be assigned to this project and their specific roles in the project. Include a brief description of the number of years with your firm, qualifications, professional certifications, job functions, current caseload, and office location(s). Brief resumes (not more than two pages long) for all key personnel may be provided as an appendix, not in the body of the proposal.

D. WORK PLAN / TECHNICAL APPROACH

1. Describe in detail the information, documents, staff assistance, facilities, or other resources you would require from CIS to complete your work; declare any critical assumptions upon which your work plan is based. For example, specify what documents you will need from CIS in order to begin your work.
2. Describe succinctly how your firm would accomplish the work and satisfy CIS' objectives included in this RFP.

3. Explain how you would approach providing capital modeling services described in the **Scope of Work** in general as well as to specific CIS members. Include the length of the engagement and the areas you would cover.

E. COST SCHEDULE

The Proposer's cost schedule must be submitted with the proposal.

All costs are to be contained in this schedule. For each service element described in the Scope of Work, that the Proposer intends to provide, include either an hourly rate or fixed fee for the service, as appropriate. Include a description of any travel-related expenses that the Proposer expects to be reimbursed. Note that since CIS is a public entity, expenses may be subject to prior approval before they will be reimbursed.

This section must also include payment terms required for services rendered and a preferred schedule of billing dates.

The Proposer may include a separate list of optional services and corresponding hourly rates/fees in the cost schedule.

F. SAMPLE CONTRACT

Submit a sample of your standard agreement for services with your response. Required provisions for the agreement are described in **Section IV(I)** and **Appendix A** of the RFP.