



CALIFORNIA ACHIEVING A BETTER LIFE EXPERIENCE ACT BOARD

Addendum No. 2

Achieving a Better Life Experience (“ABLE”) Act Board

Request for Proposals No. ABLE01-23 529A Program Plan Manager

Notice to Prospective Firms

November 22, 2022

The Standard Agreement, Exhibit E, listed under Section 9.4, “Work Order Fees”, (page 15 of 31) of the RFP is modified as follows:

In the future, the Executive Director may request Contractor to develop and implement new Program features or enhancements above and beyond the Services. If the Board and Contractor mutually agree on the proposed features or enhancements, Contractor will work with the Program to accurately memorialize the Program’s request in writing (the “Work Order”). All Work Orders shall clearly define the scope of the request and the timeline for development it will take Contractor to complete the work. The Program must approve all Work Orders in writing before commencement of work. The total amount payable pursuant to all Work Orders will not exceed \$500,000 over the entire term of this Agreement. Any work done and any features or enhancements developed pursuant to a Work Order shall be solely used for the benefit of the Program, and shall not be used for the benefit of or made available in whole or in part to any of Contractor’s other current or future clients, unless: (1) the Board gives written permission that shall not be unreasonably withheld, and (2) Contractor refunds to the State the full amount of payment made by the State for the Work Order. If the Board and the Contractor cannot agree on any new requested Program feature or enhancement, the Board reserves the right to contract separately with a third party and the Contractor agrees to use commercially reasonable efforts to integrate the new feature or enhancement into the Program.

Except as amended herein, all other provisions in the RFP remain the same.

Sincerely,

CalABLE Staff

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State Treasurer

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