



SCHOLARSHARE INVESTMENT BOARD

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ScholarShare Investment Board Request for Proposals No. SIB03-25 529 Industry Consulting Services

February 26, 2026

The following information is provided in response to questions received by the ScholarShare Investment Board regarding Request for Proposals No. SIB03-25 for 529 Industry Consulting Services.

Responses to Written Questions

1. Sections 3.3 b) (v) and Attachment 6 regarding personnel experience and resumes: Section 3.3 b)(v) requests resumes for all professionals involved in this engagement within the main proposal response and it requires the same resumes to be included in Attachment 6. To avoid duplication, would it be acceptable to provide the full resumes in Attachment 6 and use brief summaries and/or cross-references in the main response where appropriate?

The resumes provided in Section 3.3b)(v) are calculated in the scoring for Section 3.3 b), which provides a maximum of 25 points. Bidders must complete both the required Attachment 6 document and attach professional resumes for each identified key personnel who will be directly involved in providing specified services. It is acceptable to provide the full resumes in Attachment 6 and use brief summaries and/or cross-references in section 3.3b)(v) to the Attachment 6 resumes, as appropriate.

2. Section 3.3 c) (iv) regarding the Scope of Work: Section 3.3 c) (iv) refers to “every item in Section A, Scope of Work.” Should this reference be to Section 1.3, Scope of Work within the RFP or does it refer to the Scope of Work included in Exhibit A, Section 2?

The reference to “Section A, Scope of Work” in Section 3.3 c) (iv) refers Section 1.3, Scope of Work within the RFP. The Sample Standard Agreement, in Exhibit A, Section 2 describes how Section 1.3 will be contractually outlined with the winning Bidder.

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