



**Responses to Inquiries
RFP 26-02
AI Roadmap Development**

April 6, 2026

Note: INPRS received Questions #1 through #84 from the vendors by email. Questions #85 through #106 were asked at the Bidder's Conference on March 23, 2026.

1. What was the annual spend for this project in the previous year?

This is a new initiative.

2. If this is a new contract, what is the estimated annual budget?

INPRS does not share budget ranges. Vendors should propose fixed-price fees for the defined scope and rate cards for optional services.

3. Are you open to a hybrid delivery model that includes a mix of offshore and onshore resources?

Any work that involves access to or use of INPRS data must be performed by onshore resources. The use of offshore resources is not permitted unless expressly approved in writing by INPRS.

4. Will the work be performed onsite, remotely, or in a hybrid model?

INPRS is open to onsite, remote, or hybrid delivery--propose the model that fits your methodology. Any work that accesses or uses INPRS data must be performed by onshore resources. Offshore use is not permitted unless expressly approved in writing by INPRS.

5. Could you please grant an extension of 1–2 weeks for the proposal submission deadline?

As it has taken INPRS longer than expected to answer the vendor inquiries received, INPRS has extended the due date for proposals to Wednesday, April 15, 2026 at 3pm EDT. Please refer to the revised timeline on Page 7 of the revised RFP document posted along with the responses to inquiries at <http://www.in.gov/inprs/quoting.htm> .

6. Is this contract intended to be awarded to a single vendor or multiple vendors?

The intention is to award the RFP to a single vendor. However, the vendor is not prohibited from including sub-contractor(s), which if so, must be included in the proposed cost. The vendor is responsible for performance of any sub-contractor.

7. Who are the current or previous incumbents for this project?

This is a new initiative.

8. Are CPA-authorized financial statements acceptable for this solicitation?

Yes.

9. Will the consulting need to be onsite at the INPRS Offices? If so, what are the hours and how many days/week will be required?

INPRS is open to onsite, remote, or hybrid delivery. The vendor should propose the model that fits your methodology. Any work that accesses or uses INPRS data must be performed by onshore resources. Offshore use is not permitted unless expressly approved in writing by INPRS.

10. Is the intent to use Informatica for the AI development as well or will the team look for this Roadmap to bring additional technologies and recommendations that compliment?

There are no requirements to use Informatica for AI development. Vendors should evaluate INPRS' full technology landscape and propose the approaches, tools, and capabilities that best support the objectives of the AI Roadmap. Recommendations may include technologies that complement or extend the current environment, provided they align with INPRS' strategic, security, and operational considerations.

11. Appendix A1 designates Section 25 (Indemnification) as an essential, nonnegotiable clause. Can INPRS confirm whether this designation is intended to preclude all negotiation of indemnification terms in every circumstance, or whether limited, targeted modifications may be considered based on the nature and risk profile of the engagement (e.g., advisory/strategy services without system implementation)? If any

flexibility exists, please describe the appropriate process and timing for requesting such modifications.

A proposer may provide that it will indemnify INPRS for misfeasance by the proposer only. Below is an example.

Contractor agrees to indemnify, defend, and hold harmless INPRS its agents, officers, and employees from all third-party claims and suits including court costs, attorneys' fees, and other expenses arising from or related to any act of bad faith, gross negligence, intentional or willful misconduct, breach of fiduciary duty, which is solely caused by an act or omission of the Contractor.

The same holds true for indemnification by INPRS.

12. Could INPRS clarify the intended boundary between “execution support” included in the base scope and any optional services that would require a separate SOW?

Respondents should assume that the work will remain at the assessment, intake, scoring, prioritization, and stage gate/POC support level. These initiatives are intended to validate the proposed governance and execution model. The base engagement includes advisory POC support for 2-3 prioritized use cases (problem framing, data readiness assessment, success criteria, and documentation) and does not require building deployable solutions. If, during the engagement, INPRS elects to conduct a hands-on technical POC or move toward operationalization, those activities will be treated as optional services under a separate SOW, using the proposer’s rate card.

13. Approximately how many existing AI ideas or candidate initiatives does INPRS anticipate the selected vendor will assess and prioritize during this engagement?

INPRS has not yet finalized which specific initiatives will be used for this purpose, but we do have a list of potential use cases. The vendor will be expected to assist in identifying, assessing, and selecting the final candidate initiatives in collaboration with INPRS stakeholders. Additionally, the vendor should apply its AI expertise to recommend any high-value use cases in the retirement services space that may not have been previously documented.

14. For the 2–3 initiatives used to validate the model, should respondents assume these will remain at the assessment/stage-gate/POC support level, or should deeper implementation support be included within the fixed-price proposal?

Respondents should assume that the work will remain at the assessment, intake, scoring, prioritization, and stage gate/POC support level. These initiatives are intended to validate the proposed governance and execution model. The base engagement includes advisory POC support for 2-3 prioritized use cases (problem framing, data readiness assessment, success criteria, and documentation) and does not require building deployable solutions. If, during the engagement, INPRS elects to conduct a hands-on technical POC or move toward operationalization, those activities will be treated as optional services under a separate SOW, using the proposer's rate card.

15. Can INPRS provide additional guidance on the expected level of detail for the 12–24 month roadmap, as well as supporting templates, playbooks, and stage-gate artifacts?

INPRS expects the proposed 12–24 month roadmap to provide a clear, structured view of how your recommended AI governance and execution framework would be operationalized over time. While we are not prescribing a specific format, the level of detail should be sufficient for INPRS to understand major phases, decision points, dependencies, and expected outcomes. INPRS does not have predefined templates, playbooks, or stage gate artifacts that vendors are required to use. The vendor may use their own formats and best-practice structures if they support clarity, repeatability, and ease of long-term internal adoption.

16. Are there preferred deliverable formats (e.g., roadmap, RACI, KPI framework, templates, playbooks) to ensure INPRS can independently maintain them post-engagement?

INPRS does not have predefined or preferred formats for deliverables such as the roadmap, RACI, KPI framework, templates, or playbooks. As noted in the RFP, a key objective of this engagement is to develop governance materials and repeatable operational artifacts that INPRS can maintain long-term. Accordingly, respondents are encouraged to propose deliverable formats that align with their methodology and best practices, with an emphasis on clarity, usability, and sustainability for INPRS staff. Vendors may use their own standard frameworks and templates if the resulting artifacts can be adopted and maintained by INPRS post-engagement. If it is helpful to demonstrate your approach, you may also include sample formats or illustrative artifacts within your proposal.

17. Can INPRS clarify whether the training needs assessment and knowledge transfer activities should be scoped for a specific audience size or stakeholder group?

The base scope covers identifying training needs and delivering the training required for INPRS to operate the governance and intake processes, while any broader organizational training program (curriculum development or large-scale

delivery) is optional and would require a separate SOW. As part of the engagement, the vendor will also be expected to assess whether there are gaps in organizational training that should be addressed to help increase INPRS' overall AI maturity.

18. Does INPRS have an anticipated budget range, or pricing guidance respondents should consider when structuring a fixed-price proposal?

INPRS does not share budget ranges. Vendors should propose fixed-price fees for the defined scope and rate cards for optional services.

19. Could you please confirm are there any specific business units or functional areas that should be prioritized for AI use case identification?

INPRS is not identifying or prioritizing any specific business units or functional areas for AI use case identification as part of this RFP. Vendors are encouraged to propose an approach for evaluating and identifying high value, high feasibility use cases across the organization based on their methodologies and best practices. Your proposed framework should enable INPRS to assess opportunities holistically, ensuring that potential use cases are evaluated consistently and transparently across all functions.

20. Could you please confirm are there any existing change management frameworks or methodologies that the vendor should align with?

INPRS does not require vendors to align to any specific change management framework or methodology.

21. Can you clarify the key success criteria and KPIs for this engagement?

INPRS has not defined a prescriptive set of success criteria or KPIs for this engagement in advance. As outlined in the Statement of Work, vendors are expected to propose and document success metrics including pre, mid, and post engagement KPIs—that align with their methodology and the scope of work.

Generally, INPRS anticipates that success measures will address areas such as:

- i. Clarity, completeness, and usability of the AI roadmap and governance materials**
- ii. Effectiveness of knowledge transfer and staff readiness**
- iii. Establishment of KPIs for AI portfolio health and adoption**

- iv. **Quality of templates, playbooks, RACIs, stage gates, and supporting artifacts delivered**
- v. **Ability for INPRS to independently maintain deliverables post engagement**

INPRS encourages respondents to recommend the success criteria and KPI framework they believe will best measure value, progress, and long term sustainability of the proposed approach. This will be a deliverable driven engagement specific to the work outlined in the RFP.

22. What format of training is preferred (live sessions, recorded modules, documentation)?

INPRS generally prefers a blended training approach, combining recorded modules, hands-on or mentoring-based learning, and supporting documentation.

23. What is the anticipated project go-live date?

As noted in the schedule within the RFP, we are targeting to select the vendor by May 4, 2026. We will move quickly to complete the contract and onboard the project as soon as possible. We expect work to commence on or around May 25, 2026.

24. What are the expectations and timeline for ongoing support and maintenance after the system is implemented?

INPRS has not defined a specific ongoing support or maintenance period for this engagement beyond the delivery of the roadmap, governance materials, and associated knowledge-transfer activities. As outlined in the Statement of Work, the selected vendor is expected to provide documentation, knowledge transfer, and adoption support to ensure INPRS can independently maintain and operationalize the recommended approach.

Respondents should propose an appropriate support and maintenance timeline based on their methodology, including any post-implementation transition activities they consider necessary. INPRS will finalize expectations in collaboration with the selected vendor during contract negotiation and project initiation.

Any system implementations expected to be completed by the vendor would fall under optional services and require a separate Statement of Work and Contract amendment.

25. Do you expect the vendor to perform any tasks on-site, or can all work be performed remotely?

INPRS is open to onsite, remote, or hybrid delivery propose the model that fits your methodology. Any work that accesses or uses INPRS data must be performed by onshore resources. Offshore use is not permitted unless expressly approved in writing by INPRS.

26. Do you accept offshore resources?

Any work that involves access to or use of INPRS data must be performed by onshore resources. The use of offshore resources is not permitted unless expressly approved in writing by INPRS.

27. What platforms and tools are used for project and portfolio management (for example, ServiceNow, Jira, Smartsheet)?

INPRS uses Service Now.

28. What cloud environments and core technology stack is in use (for example, Azure, AWS on premises)?

Most of INPRS's data and core systems are currently hosted on prem, primarily in Oracle databases. INPRS also maintains a smaller cloud footprint in both AWS and Azure. As part of our long-term technology roadmap, INPRS is evaluating a broader move to the cloud, with Oracle Cloud Infrastructure (OCI) and AWS both under consideration. Vendors should keep this current state environment and potential future direction in mind when proposing their solution and approach. Moreover, we are open to using the best foundational model(s), even those outside of OCI and AWS, to achieve the highest return on ROI and/or value.

29. Should proof of concept development and costs be included in the fixed-price proposal, or defined and priced later?

Respondents should assume that the work will remain at the assessment, intake, scoring, prioritization, and stage gate/POC support level. These initiatives are intended to validate the proposed governance and execution model. The base engagement includes advisory POC support for 2-3 prioritized use cases (problem framing, data readiness assessment, success criteria, and documentation) and does not require building deployable solutions. If, during the engagement, INPRS elects to conduct a hands-on technical POC or move toward operationalization, those activities will be treated as optional services under a separate SOW, using the proposer's rate card.

30. Is there a target budget range for this engagement?

INPRS does not share budget ranges. Vendors should propose fixed-price fees for the defined scope and rate cards for optional services.

31. In §3.2.1 you mention “guiding AI initiatives through a process.” What does that scope look like—advisory only, execution support, current status of initiatives, and level of help needed?

INPRS has asked the vendor to validate and refine a repeatable, end-to-end framework for evaluating, approving, and implementing AI initiatives. This includes structured intake, scoring, prioritization, governance review, execution oversight, and measurement.

Respondents should assume that the work will remain at the assessment, intake, scoring, prioritization, and stage gate/POC support level. These initiatives are intended to validate the proposed governance and execution model. The base engagement includes advisory POC support for 2-3 prioritized use cases (problem framing, data readiness assessment, success criteria, and documentation) and does not require building deployable solutions. If, during the engagement, INPRS elects to conduct a hands-on technical POC or move toward operationalization, those activities will be treated as optional services under a separate SOW, using the proposer’s rate card.

32. Can INPRS describe its current AI maturity, including any existing tools, pilots, or AI-enabled processes?

INPRS is in the early stages of its AI maturity journey. While several AI enabled tools and pilots are in use across the organization, INPRS does not yet have a unified enterprise AI framework or operating model in place.

Current AI-related activities include:

- **Use of several AI enabled tools such as Microsoft Copilot, Informatica Claire, and Salesforce Agent Force, which are supporting functions like productivity, data management, and call center operations.**
- **Ongoing pilots and experimentation within a small R&D team, including testing models and prototypes using AWS Bedrock in a sandbox environment.**

- **Early adoption of emerging tools such as Notebook LM, with additional solutions under consideration but not yet approved or implemented.**

INPRS is now seeking to mature its capabilities by developing a comprehensive, repeatable AI governance and execution framework. As part of this engagement, the selected vendor will help assess current maturity, identify gaps, and establish a structured approach for responsibly adopting AI across INPRS.

33. Are there existing AI use case backlogs or identified opportunities that will be shared with the selected vendor?

Yes.

34. What are the top strategic priorities or business domains (e.g., member services, investments, operations) where AI is expected to deliver the highest value?

The purpose of this engagement is to help INPRS evaluate and determine where AI can deliver the highest value across the organization. INPRS is not pre-defining strategic priority areas or business domains for this work; instead, we expect the vendor to bring a structured approach for identifying and assessing high-value AI opportunities in collaboration with INPRS stakeholders.

35. Does INPRS have predefined evaluation criteria or scoring frameworks for prioritizing AI use cases (e.g., value, feasibility, risk, data readiness)?

INPRS does not have predefined evaluation criteria or an existing scoring framework for prioritizing AI use cases. As outlined in the RFP, one of the objectives of this engagement is for the selected vendor to propose and develop a structured, repeatable approach for intake, scoring, and prioritization.

36. What level of data availability and quality assessment currently exists to support AI use case evaluation?

INPRS does not currently have a formal, enterprise wide data availability or data quality assessment framework specifically designed to support AI use case evaluation. While data quality and data integrity efforts are underway across the organization, such as ongoing data cleansing activities and governance work reflected in internal operations, these efforts are not yet part of a standardized AI intake or scoring process.

As part of this engagement, INPRS expects the selected vendor to assess current data readiness, identify gaps, and recommend a structured approach for evaluating data availability and quality as part of a broader AI use-case prioritization framework.

37. Should AI vs. non-AI alternative analysis be performed for all use cases or only select scenarios?

The expectation would be to perform this analysis on prioritized use cases, rather than the entire list.

38. Does INPRS have a preferred format or tools for delivering and maintaining the 12–24-month AI roadmap (e.g., Excel, Power BI)?

INPRS does not have a preferred format or specific tools for delivering or maintaining the 12–24-month AI roadmap. As noted in the RFP, INPRS is not prescribing templates or toolsets for roadmap documentation. Vendors are encouraged to propose formats that align with their methodology and best practices, provided the resulting materials are clear, easy to maintain, and support long-term usability for INPRS staff.

39. How should the roadmap align with budget cycles, funding approvals, and state-level initiatives?

In general, the roadmap should:

- **Align with INPRS' budget and approval processes, including sequencing activities to align with funding decision points. (July 1 through June 30)**

- **Identify where dependencies such as budget, staffing needs, or technology investment may influence timing.**
- **Consider state-level priorities, mandates, or governance requirements that could affect planning, rollout, or resourcing. INPRS will assist in coordinating these initiatives with the state.**

40. What level of detail is expected for RACI definitions, KPIs, and sequencing of initiatives within the roadmap?

INPRS is not prescribing a specific level of granularity for RACI definitions, KPIs, or initiative sequencing. As outlined in the RFP, the vendor is expected to recommend the appropriate level of detail based on industry best practices and the needs of INPRS.

Vendors should propose a level of detail that enables INPRS to use the roadmap as a practical, maintainable guide for planning and decision making without becoming overly prescriptive or burdensome.

41. Can INPRS provide detailed documentation or references for IOT and MPH AI standards, governance processes, and approval workflows?

State of Indiana Artificial Intelligence Policy and Guidance

- a) <https://www.in.gov/mph/AI/>
 - i. **AI Policy and guidelines for employees at the State of Indiana. The AI policy is issued and monitored by the OCDO, CPO and MPH.**

42. What are the key governance stage gates, approval timelines, and stakeholder groups involved (e.g., AI Committee, Data Governance Council)?

AI Request Reviews and approvals at INPRS include, but are not limited to, the following steps:

- **The Information Management Team conducts the initial intake and readiness review.**

- **When ready, the request is presented to the Data and AI Governance Council for review and approval.**
- **If approved, the request proceeds to MPH for required approval.**
- **Once approvals are complete, the effort is prioritized alongside other existing initiatives.**

The vendor will support preparation of materials for these reviews but will not independently approve or advance initiatives without INPRS authorization. INPRS may update existing processes based on recommendations from the vendor. As part of this engagement, the vendor will also be expected to help define the stage gates and associated approval timelines.

43. Are there predefined requirements for AI transparency, auditability, bias mitigation, and ethical AI frameworks?

Refer to question 41 for information about existing policy and guidance. However, we expect the vendor to identify any and all opportunities to close gaps in any of the aforementioned governance and or AI life cycle processes.

44. Are there preferred or mandated technology platforms, cloud environments, or tools that vendors should align with?

INPRS does not have a preferred format or specific tools for delivering or maintaining the 12-24 month AI roadmap or strategy. As noted in the RFP, INPRS is not prescribing templates or toolsets. Vendors are encouraged to propose formats that align with their methodology and best practices, provided the resulting materials are clear, easy to maintain, and support long-term usability for INPRS staff.

45. What level of technical detail is expected in defining AI solutions (conceptual architecture vs. implementation-level design)?

Provide conceptual architecture and reference designs sufficient to show how proposed AI capabilities would fit INPRS's environment (integration points, security controls, data flows). Detailed implementation designs (e.g., component

level build specs, IaC, model training pipelines) are optional services deliverable via a separate SOW if INPRS chooses to proceed.

46. Are there any constraints related to data access, privacy, or security that could impact AI model design and deployment?

Align with State of Indiana AI Policy & Guidance, NIST AI RMF, NIST SP 800-53, and INPRS's Zero Trust principles. Identify gaps and propose improvements across transparency, auditability, bias mitigation, and ethical AI.

47. What criteria will INPRS use to select the 2–3 AI initiatives for pilot/validation?

INPRS has not established predefined criteria for selecting the 2–3 initiatives that will be used to validate the AI governance and execution framework. These initiatives will be chosen in collaboration with the selected vendor as part of the early-stage roadmap and intake assessment activities.

48. What level of vendor involvement is expected in POC execution (advisory vs. hands-on implementation)?

Respondents should assume that the work will remain at the assessment, intake, scoring, prioritization, and stage gate/POC support level. These initiatives are intended to validate the proposed governance and execution model. The base engagement includes advisory POC support for 2-3 prioritized use cases (problem framing, data readiness assessment, success criteria, and documentation) and does not require building deployable solutions. If, during the engagement, INPRS elects to conduct a hands on technical POC or move toward operationalization, those activities will be treated as optional services under a separate SOW, using the proposer's rate card.

49. What is INPRS's current organizational readiness for AI adoption, including training needs and change management maturity?

INPRS is in the early stages of organizational readiness for AI adoption. While some foundational training and governance structures exist, AI familiarity varies across the organization, and change management maturity specific to AI is still developing.

Base scope includes training needs assessment and delivery of training required to operate the governance & intake processes (materials + sessions for the core team). Broader organizational programs (e.g., enterprise AI literacy curriculum or large-scale rollout) are optional and require a separate SOW.

50. How will adoption success and business impact be measured (baseline KPIs, target outcomes)?

INPRS has not predefined baseline KPIs or target outcomes for this engagement. As outlined in the RFP and SOW, the selected vendor will be responsible for recommending and defining adoption success measures and business impact KPIs as part of the roadmap and governance framework.

51. Can INPRS clarify expectations for level of effort, budget range, and milestone-based payment structure under the fixed-price model?

INPRS has not defined a prescribed level of effort, budget range, or milestones based payment structure for this fixed price engagement. Respondents should propose these elements based on their recommended approach, methodology, and understanding of the scope outlined in the RFP.

In general, INPRS expects proposals to:

- **Provide a clear level of effort aligned to the major workstreams and deliverables.**
- **Include a fixed price bid with any optional services (such as implementation support) priced separately.**
- **Outline a milestones based payment schedule tied to completion and acceptance of key deliverables.**

INPRS will review and finalize the level of effort and payment structure during contract negotiation with the selected vendor.

52. What cloud platform(s) does INPRS currently use or plan to use for AI and data workloads (e.g., Microsoft Azure, AWS, GCP)? If multiple platforms are in use, which is

considered primary?

Most of INPRS's data and core systems are currently hosted on prem, primarily in Oracle databases. INPRS also maintains a smaller cloud footprint in both AWS and Azure. As part of our long-term technology roadmap, INPRS is evaluating a broader move to the cloud, with Oracle Cloud Infrastructure (OCI) and AWS both under consideration. Vendors should keep this current state environment and potential future direction in mind when proposing their solution and approach. Moreover, we are open to using the best foundational model(s), even those outside of OCI and AWS, to achieve the highest return on ROI and/or value.

53. Beyond Informatica IDMC, what other data, analytics, or AI/ML tools and platforms does INPRS currently license or actively use (e.g., Microsoft Fabric, Power BI, Azure AI services, Databricks, Snowflake)?

INPRS uses ServiceNow, Microsoft 365 for productivity/collaboration, and Looker (primary), Power BI, and Tableau Desktop for BI/reporting; AI enabled productivity tools such as Microsoft Copilot; Notebook LM, and cloud-based AI services such as AWS Bedrock, which INPRS has used for model exploration and hands-on labs in a non-prod sandbox environment.

INPRS does not currently mandate a specific enterprise AI/ML platform. Vendors should propose solutions that align with industry best practices while being compatible with INPRS's existing tools, security requirements, and long-term technology direction.

54. What is INPRS's current enterprise collaboration and productivity platform (e.g., Microsoft 365, Google Workspace)? Are there preferred tools for maintaining roadmap visuals and governance documentation (e.g., SharePoint, Confluence, Smartsheet)?

INPRS' primary enterprise collaboration and productivity platform is Microsoft 365.

INPRS does not have a preferred format or specific tools for delivering under this engagement. As noted in the RFP, INPRS is not prescribing templates or toolsets for roadmap documentation. Vendors are encouraged to propose formats that align with their methodology and best practices, provided the resulting materials are clear, easy to maintain, and support long-term usability for INPRS staff.

55. Can INPRS provide the specific Indiana Office of Technology (IOT) and Management Performance Hub (MPH) AI standards, policies, and security requirement documents referenced in Section 3.4, or direct respondents to publicly available versions? Understanding these requirements is necessary to accurately scope compliance activities and pricing.

State resources:

State of Indiana Artificial Intelligence Policy and Guidance

- a) <https://www.in.gov/mph/AI/>
- b) **AI Policy and guidelines for employees at the State of Indiana. The AI policy is issued and monitored by the OCDO, CPO and MPH.**

56. Are there any pending changes or updates to IOT/MPH AI policies that respondents should account for in their 12-24 month roadmap?

At this time, there are no pending changes or updates to IOT or MPH AI policies that respondents need to account for in their 12-24-month roadmap. Current guidance, including the MPH AI Do's & Don'ts and the AI Cloud Sandbox requirements, remains in effect and should be used as the basis for your proposed approach. If any revisions occur during the engagement period, they are expected to be incremental and aligned with the State of Indiana's overarching AI governance practices; vendors would be notified accordingly.

57. Section 3.2.1 references guiding 2-3 AI initiatives through the process. Has INPRS already identified candidate initiatives, or is identifying and selecting those initiatives part of the vendor's scope?

INPRS has not yet finalized which specific initiatives will be used for this purpose, but we do have a list of potential use cases. The vendor will be expected to assist in identifying, assessing, and selecting the final candidate initiatives in collaboration with INPRS stakeholders. Additionally, the vendor should apply its

AI expertise to recommend any high-value use cases in the retirement services space that may not have been previously documented.

58. Section 3.2.4 includes "support development of proofs of concept" and "assist with technical implementation," while Section 3.8 lists "solution building" and "solution deployment" as optional services requiring a separate SOW. Where does INPRS draw the line between POC support (in scope) and solution building (optional)? For example, does POC support include writing code, training models, or deploying prototypes, or is it limited to advisory support such as defining requirements, success criteria, and architecture?

Respondents should assume that the work will remain at the assessment, intake, scoring, prioritization, and stage gate/POC support level. These initiatives are intended to validate the proposed governance and execution model. The base engagement includes advisory POC support for 2-3 prioritized use cases (problem framing, data readiness assessment, success criteria, and documentation) and does not require building deployable solutions. If, during the engagement, INPRS elects to conduct a hands on technical POC or move toward operationalization, those activities will be treated as optional services under a separate SOW, using the proposer's rate card.

59. Section 3.8 lists "build and/or deliver the training based on identified training needs" as an optional service. Does this mean the base scope (Section 3.2.3) is limited to identifying training needs and designing training curricula, with actual training delivery reserved as optional? Or does the base scope include delivering training on the governance processes, intake tools, and frameworks the vendor creates?

Base scope includes training needs assessment and delivery of training required to operate the governance & intake processes (materials + sessions for the core team). Broader organizational programs (e.g., enterprise AI literacy curriculum or large-scale rollout) are optional and require a separate SOW.

60. What INPRS staff resources will be allocated to support this engagement (e.g., an INPRS project manager, designated business and technical SMEs, executive sponsor availability)? Understanding the client team's expected commitment level is important for accurate scoping and timeline estimation.

INPRS will allocate a focused cross functional team to support this engagement. The core participants will include representation from Executive Sponsors, IT,

data governance and data management, enterprise architecture, and select business SMEs. INPRS will also arrange access to additional staff as required. An INPRS project manager will be assigned to support the vendor's project manager.

61. Is the May 25, 2026 commencement date firm, or is there flexibility depending on contract negotiation timelines? What is the expected total engagement duration for the core scope?

The May 25, 2026 start date is a target and can shift based on the timing of contract negotiations. INPRS is flexible on the actual commencement date.

For planning purposes, vendors should assume the core scope will take approximately 6–8 months, though INPRS expects vendors to propose the timeline that best fits their methodology. The contract structure allows up to a 12-month window to accommodate variations in vendor-proposed schedules.

62. How many AI use case ideas or opportunities has INPRS already identified or collected through its existing governance process? Are there any that have already progressed through initial review?

INPRS has already compiled a list of AI use case ideas and opportunities, but these vary in level of definition and maturity. None have fully progressed through INPRS's formal intake, review, and stage gate process. As discussed during the Bidder's Conference, these ideas will serve as inputs for the selected vendor, who will help evaluate, refine, and prioritize them as part of the engagement

63. Has INPRS previously piloted or deployed any AI or machine learning solutions, whether internally developed or vendor-provided? If so, can you briefly describe their status.

AI Tools Currently in Use or Exploration

- **Microsoft Copilot (M365) – Approved/Deployed: Approximately 141 users have been approved; licenses are being rolled out in phases. Copilot Chat is available to all staff.**
- **Salesforce Agent Force: Approved/Implementation is in process for the following use cases:**
 - **Auto Case Classification**
 - **Knowledge Article Recommendations**
 - **Call Summarization**
 - **Additional Agent Force use cases may be added during the engagement period as business units explore opportunities.**
- **Informatica ClaireGPT – Approved/Deployed: Used within the Informatica platform for metadata, lineage, and productivity assistance.**
- **GitLab Duo – Approved/In POC process: Used narrowly for system documentation support. Additional use cases may be added.**
- **Notebook LM (Google) – Approved/In Deployment Process**
- **Zoom AI Companion – Request submitted, approved by the Data Governance Council (DGC), and now under MPH review. The use case is very narrow.**

64. What is INPRS's general assessment of its current data readiness for AI workloads? For example, are source data sets generally well-cataloged, quality-measured, and accessible, or is significant data preparation expected?

INPRS has established some foundational data governance capabilities, but overall data readiness for AI is still maturing. While several systems and data assets are cataloged, data quality, consistency, and accessibility vary. Assessing data readiness and identifying gaps is a key part of the AI Roadmap engagement.

65. How frequently does the AI Committee and Data Governance Council meet, and what is the typical turnaround time for stage-gate approvals? Understanding governance cadence is critical for building realistic timelines.

The DGC/AI Committee meets twice a month, with ad hoc meetings scheduled as needed. Assuming all required information has been provided and properly socialized in advance, stage-gate approvals are typically issued during the meeting.

66. Beyond the AI Committee and Data Governance Council, are there other approval bodies or stakeholders whose sign-off is required before an AI initiative can proceed (e.g., CIO, legal, compliance, budget office)?

Beyond the AI Committee and Data Governance Council, INPRS does not have additional standing approval bodies dedicated specifically to AI initiative sign-off. After INPRS approval, the request moves to MPH/IOT for approval.

Depending on the nature of the use case or tool, additional reviews may be required as part of existing INPRS existing governance model for example, Architecture Review Board, budget, and prioritization. These reviews/approvals are generally integrated into the normal project intake and approval workflow rather than constituting separate AI specific governing bodies.

67. Are the evaluation criteria listed in Section 4.2 weighted? If so, can INPRS share the relative weights or indicate which criteria carry the most significance?

We do not share the evaluation criteria.

68. Is there a target budget range or not-to-exceed amount for this engagement that respondents should be aware of when developing their fixed-price fee proposals?

INPRS does not share budget ranges. Vendors should propose fixed-price fees for the defined scope and rate cards for optional services.

69. Section 3.2.3 states "INPRS must be able to maintain the roadmap and visuals without vendor dependency." Are there specific tools INPRS prefers or already uses for project roadmapping and portfolio visualization, or is the vendor expected to recommend tools as part of the engagement

INPRS does not have a preferred format or specific tools for delivering under this engagement. As noted in the RFP, INPRS is not prescribing templates or toolsets for roadmap documentation. Vendors are encouraged to propose formats that align with their methodology and best practices, provided the resulting materials are clear, easy to maintain, and support long-term usability for INPRS staff.

70. The RFP states that the contract be in effect for 12 months. Is the expectation that this engagement last a full 12 months or is INPRS open to shorter durations?

The intent of this language is to establish a maximum contract term, not to require that the engagement lasts the full 12 months. INPRS is open to timelines shorter than one year, provided all required services and deliverables outlined in the RFP are completed to INPRS's satisfaction. Respondents may propose a shorter duration if they believe the scope can be fully delivered within that timeframe.

71. Section 3.9 of the RFP refers to a list of foundational data and AI governance items out of scope. Are bidders able to review those items before the submissions are due, during the engagement, or are they not reviewable by teams at all?

These items can be made available as appropriate once the engagement begins.

72. *3.2.2 Assess and prioritize AI opportunities.* Please provide a listing of current technologies that are used for administering the defined benefit plans benefit certifications, payroll systems, defined contribution plan recordkeeping systems and any other technologies that are currently used in day-to-day operations.

Information can be provided as part of discovery activities of the project to the winning bidder.

73. *3.2.6 Change Management and adoption support.* How many staff are currently at INPRS? How many different teams are used for the defined contribution and defined benefit day-to-day administration? Have the administration teams, systems and processes been harmonized between PERF and TRF Plans (prior to the 2011 merger) or are these teams, systems and/or processes different?

An org chart can be provided for Vendor reference.

At a high level, INPRS employs approx. 250 staff across various functions such as Investments, IT, Strategic Initiatives, Legal, Finance, Operations,

Communications, and Audit, and HR. INPRS maintains dedicated operational functions supporting defined benefit (DB) and defined contribution (DC) administration. Since the statutory consolidation in 2011, INPRS has aligned governance and oversight across plans while maintaining distinctions in systems and processes where required by statute, legacy plan structure, or operational needs.

74. *4.1 Length of Contract compared to Page 11 and 3.2.3.* The term of the contract is referenced as being in effect for one (1) year or completion of services, whichever is sooner. Page 11 of the RFP references that the selected vendor will support the development and initial rollout of a 12-24 month AI execution roadmap and help implement the related roadmap. In addition, 3.2.3 references developing and delivering a 12-24 month AI execution roadmap. Please confirm if the goal of the RFP is for the vendor to create the roadmap but be finished with their portion of the execution support by the end of one year?

The roadmap itself is expected to cover a 12–24 month period, while the vendor’s role is to develop the roadmap and support its initial rollout within the period defined by the contract.

INPRS anticipates that the vendor’s direct execution support responsibilities will be completed within the one-year contract term. If INPRS determines that continued assistance is beneficial, Section 4.1 allows for renewals under the same terms and conditions at INPRS’s option.

Respondents may propose a shorter duration if they believe the scope can be fully delivered within that timeframe.

75. Can you confirm the expected number of AI use cases to be evaluated and prioritized during this engagement?

INPRS has not yet finalized which specific initiatives will be used for this purpose, but we do have a list of potential use cases. The vendor will be expected to assist in identifying, assessing, and selecting the final candidate initiatives in collaboration with INPRS stakeholders. Additionally, the vendor should apply its

AI expertise to recommend any high value use cases in the retirement services space that may not have been previously documented.

76. Will access be provided to existing AI governance frameworks, policies, and documentation for assessment?

These items will be made available as appropriate once the engagement begins.

77. Are there any preferred technology platforms or tools that must be considered while recommending AI solutions?

INPRS does not have a preferred format or specific tools for delivering under this engagement. As noted in the RFP, INPRS is not prescribing templates or toolsets for roadmap documentation. Vendors are encouraged to propose formats that align with their methodology and best practices, provided the resulting materials are clear, easy to maintain, and support long-term usability for INPRS staff.

78. Can you clarify the expected level of hands-on support required for proof of concept (POC) development?

Respondents should assume that the work will remain at the assessment, intake, scoring, prioritization, and stage gate/POC support level. These initiatives are intended to validate the proposed governance and execution model. The base engagement includes advisory POC support for 2-3 prioritized use cases (problem framing, data readiness assessment, success criteria, and documentation) and does not require building deployable solutions. If, during the engagement, INPRS elects to conduct a hands on technical POC or move toward operationalization, those activities will be treated as optional services under a separate SOW, using the proposer's rate card.

79. What internal resources or teams will be available to support workshops, interviews, and data discovery?

INPRS will allocate a focused cross-functional team to support this engagement. The core participants will include representation from Executive Sponsors, IT,

data governance and data management, enterprise architecture, and select business SMEs. INPRS will also arrange access to additional staff as required. An INPRS project manager will be assigned to support the vendor's project manager.

80. Are there any specific compliance, security, or regulatory standards that the proposed solution must adhere to?

Align with State of Indiana AI Policy & Guidance, NIST AI RMF, NIST SP 800-53, and INPRS's Zero Trust principles. Identify gaps and propose improvements across transparency, auditability, bias mitigation, and ethical AI.

81. Will access be provided to current system architecture and data inventories for evaluation?

These items will be made available as appropriate once the engagement begins.

82. What are the key success criteria and KPIs expected at the conclusion of this engagement?

INPRS has not predefined baseline KPIs or target outcomes for this engagement. As outlined in the RFP and SOW, the selected vendor will be responsible for recommending and defining adoption success measures and business impact KPIs as part of the roadmap and governance framework.

83. Is there openness to vendors proposing additional tools or accelerators to support AI governance and roadmap execution?

Yes

84. Can you provide details of the incumbent vendor(s), including the previously awarded proposal/response and corresponding pricing structure, for reference and benchmarking purposes?

There is no incumbent vendor.

85. Are we expected not to touch data structure? Do you want feedback on the data format/architecture—would you be open to reorganization if it enables services/products?

INPRS is open to feedback on data structures, formats, and architecture. INPRS recognizes that some existing structures stem from legacy decisions and welcomes vendor recommendations for improvement or reorganization when it enables better services, products, or AI capabilities. The goal of this engagement includes helping INPRS move toward a more modern, cloud aligned data environment, so constructive input on data architecture is fully encouraged

86. §3 and §3.8 appear to seek a repeatable process framework with a 12–24 month execution roadmap, including templates, playbooks, RACI, KPIs, etc., designed for INPRS to maintain without vendor dependency. Is that correct?

Yes.

87. Is the goal for INPRS to run the entire framework and knowledge transfer going forward?

Yes.

88. The 2–3 initiatives to be guided through the process—are they already chosen or are you looking to pick the first ones to push through the governance framework?

INPRS has not yet finalized which specific initiatives will be used for this purpose, but we do have a list of potential use cases. The vendor will be expected to assist in identifying, assessing, and selecting the final candidate initiatives in collaboration with INPRS stakeholders. Additionally, the vendor should apply its AI expertise to recommend any high-value use cases in the retirement services space that may not have been previously documented.

89. §3.8 references a separate SOW/contract amendment for solution building, deployment, and maintenance. Is that accurate?

Yes.

90. Will details on data location and technologies be shared upfront, or only post-award?

Most of INPRS's data and core systems are currently hosted on prem, primarily in Oracle databases. INPRS also maintains a smaller cloud footprint in both AWS and Azure. As part of our long-term technology roadmap, INPRS is evaluating a broader move to the cloud, with Oracle Cloud Infrastructure (OCI) and AWS both under consideration. Vendors should keep this current state environment and potential future direction in mind when proposing their solution and approach. Moreover, we are open to using the best foundational model(s), even those outside of OCI and AWS, to achieve the highest return on ROI and/or value.

91. Will shaping the strategy for moving data/tools into cloud be part of this initiative?

Shaping the overall cloud migration strategy is not in scope for this engagement. However, the vendor is expected to help shape the AI strategy and governance playbook so it can support INPRS's future move to the cloud. INPRS welcomes recommendations on cloud-aligned architectures, data locations, and toolsets where they enable stronger AI capabilities, but the engagement does not require developing a full cloud transition plan.

92. Are any cloud providers excluded?

No cloud providers are excluded; however, any recommended solutions must meet GovRAMP/FedRAMP (Moderate) requirements, otherwise waivers would be required. This ensures alignment with statewide security and compliance standards.

93. Are AI use cases already identified, or is discovery part of this project?

INPRS has not yet finalized which specific initiatives will be used for this purpose, but we do have a list of potential use cases. The vendor will be expected to assist in identifying, assessing, and selecting the final candidate initiatives in collaboration with INPRS stakeholders. Additionally, the vendor should apply its

AI expertise to recommend any high-value use cases in the retirement services space that may not have been previously documented.

94. Can we include a few weeks of stakeholder interviews plus review of existing artifacts?

Yes. INPRS expects the selected vendor to begin the engagement with stakeholder interviews and a review of existing documentation and artifacts. Including a few weeks for discovery activities such as interviews, workshops, and review of current materials—is fully appropriate and aligned with INPRS’s expectations for grounding the AI roadmap in the current state environment.

95. Is the FedRAMP requirement Moderate or High?

The requirement is for GovRAMP compliance; FedRAMP (Moderate) may be substituted.

96. Does INPRS have any GovCloud tenancy (Azure/AWS)?

Most of INPRS’s data and core systems are currently hosted on prem, primarily in Oracle databases. INPRS also maintains a smaller cloud footprint in both AWS and Azure. As part of our long-term technology roadmap, INPRS is evaluating a broader move to the cloud, with Oracle Cloud Infrastructure (OCI) under consideration, along with other cloud providers.

Vendors should keep this current state environment and potential future direction in mind when proposing their solution and approach.

97. Does FedRAMP apply to the framework deliverables or only solutions that touch INPRS data?

GovRAMP/FedRAMP considerations should be applied to the framework itself, in the sense that the framework must account for whether any recommended solutions will need to be GovRAM/FedRAMP-certified. However, the deliverables you produce as part of the strategy work do not need to be FedRAMP-certified,

nor does INPRS require vendors to use only FedRAMP-authorized tools when creating or delivering those materials.

98. What has INPRS done with StateRAMP?

INPRS has not done extensive work with StateRAMP (now GovRAMP) to date. INPRS must be compliant with GovRAMP or FedRAMP (Moderate).

99. For the training needs analysis, how many roles require training—organization-wide or specific roles?

Base scope includes training needs assessment and delivery of training required to operate the governance & intake processes (materials + sessions for the core team). Broader organizational programs (e.g., enterprise AI literacy curriculum or large-scale rollout) are optional and require a separate SOW. The vendor should consider different levels, such as Board of Trustees, executives, senior leadership, and organization-wide AI literacy

100. Can you share the budget for this project?

INPRS does not share budget ranges. Vendors should propose fixed-price fees for the defined scope and rate cards for optional services.

101. Who are the current practitioners (data/AI team) to receive skills transfer?

INPRS's current data/AI practitioners who will receive skills transfer include a small cross-functional group consisting of staff from the Information Management Team, Data Governance and AI Committee members, and select SMEs from a small R&D group exploring tools such as AWS Bedrock.

102. Has spending authority for this project been approved, or will funds be sought post-proposal?

INPRS has already secured the spending authority necessary to issue this RFP.

103. The meeting is recorded—will the recording be circulated to participants?

Yes, the meeting was recorded, and it may be circulated to participants.

104. Are you using default, pre-configured FedRAMP models on Bedrock, or just experimenting?

INPRS is currently experimenting with AWS Bedrock through a small R&D group. This work is exploratory, and INPRS is not yet using default or pre-configured GovRAMP/FedRAMP models in an operational or production capacity. Bedrock usage has not been formalized through the AI governance process.

105. Of the solutions you have, are they conversational, agentic, etc.? Where are you beyond Copilot in Teams?

AI Tools Currently in Use or Exploration

- **Microsoft Copilot (M365) – Approved/Deployed: Approximately 141 users have been approved; licenses are being rolled out in phases. Copilot Chat is available to all staff.**
- **Salesforce Agent Force: Approved/Implementation is in process for the following use cases:**
 - **Auto Case Classification**
 - **Knowledge Article Recommendations**
 - **Call Summarization**
 - **Additional Agent Force use cases may be added during the engagement period as business units explore opportunities.**
- **Informatica ClaireGPT – Approved/Deployed: Used within the Informatica platform for metadata, lineage, and productivity assistance.**
- **GitLab Duo – Approved/In POC process: Used narrowly for system documentation support. Additional use cases may be added.**
- **Notebook LM (Google) – Approved/In Deployment Process**

- **Zoom AI Companion – Request submitted, approved by the Data Governance Council (DGC), and now under MPH review. The use case is very narrow.**

106. What’s the cultural adaptation like—excitement, hesitation, resistance?

INPRS is experiencing a generally positive cultural shift toward AI, with many staff showing clear excitement and early adoption of tools such as Copilot. As expected in any transformation, there is also some hesitation and occasional resistance, reflecting differing levels of familiarity and comfort. Overall, sentiment leans more excited than hesitant.