

September 12, 2023

Interpretations and Clarifications

for

Request for Qualifications for Stewardship and Corporate Governance Strategy Consulting Services

1. Appendix A, Section 2, Qualifications and Experience
 - If confidentiality agreements preclude the respondent from disclosing the names of former clients, then it is recommended that the respondent, if possible, describe the entity in generic terms, such as “a large US public pension”.
2. Appendix A, Section 4, Fees
 - Please provide your proposed fee structure and model.
3. Appendix A, Section 6, References
 - If confidentiality provisions exist that challenge the ability to provide references, SFERS can accept references from others that have seen the respondent’s work product. SFERS will notify the respondent prior to contacting any reference.
4. Appendix A, Section 7, Disputes and Litigation
 - Please describe instances, in general terms, if necessary, where a contract (of services similar to the RFQ) was terminated or dismissed due to a dispute or disagreement.
5. Form of Consulting Agreement (9.b)
 - Please provide the marked agreement in response to the Request for Qualifications.