

Responses to Questions and Clarifications in re: RFP for Proxy Advisory Services
March 22, 2022

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1. Does the RFP seek “a discussion of both a) proxy voting research based on a given meeting agenda and issues and b) sustainability related research showcasing on the example of one company, how said investment/engagement focused research highlights specific areas of sustainability (or ESG) performance?”

Answer: Yes.

2. With respect to the RFP’s request for information regarding “ratings,” we are interested in whether the respondent can provide company rating reports that include assessment/evaluation of ESG factors.
3. With regard to the request for an “analysis on a specific company basis on corporate governance,” we are interested in the respondent’s ability to provide proxy research reports and recommendations for specific companies.
4. There will be a finals presentation and/or other opportunity to provide additional information to elaborate on the questions set forth in the RFP.
5. Respondents are asked to submit a complete RFP response, rather than a redacted RFP response. To the extent that the complete RFP response includes information that is deemed proprietary and/or confidential, then the respondent should identify such information. To the extent that there is a request for proposals submitted in response to this RFP pursuant to the Freedom of Information Act, then the Treasury may be able to redact proprietary and/or confidential information to the extent allowed under the law.