



MWRDRF RFP Bidders' Conference Questions

#	Bidder Question
1.	01 RFP Information, 010 Purpose of this RFP, 001 Purpose Overview, page 5 MWRDRF has set the expectation that 100% of the agreed-upon commitments will be included in the delivery to the QA and production environments. Does MWRDRF agree that this is 100% of the commitments <i>after</i> requirements documents are completed and approved?
	100% of the commitments should be met after requirements documents are completed and approved.
2.	01 RFP Information, 020 RFP and Bidder Selection Timeline, 001 Projected Timeline, page 8 The projected schedule has finalists notified on 11/22 and oral presentations beginning 11/30. November 22 is the start of the holiday week. On page 18, the RFP states that the demonstration shall conform to the scenarios provided. This is a very short time to build a quality demonstration that addresses specific scenarios. Can the schedule be revised to provide additional time for vendors to review and prepare the scenarios desired for the presentation?
	MWRDRF understands that this is a short time frame. MWRDRF will review the schedule in advance and will be announce any modifications in a timely matter.
3.	01 RFP Information, 030 RFP Instructions, 001 Response Submissions, page 10 (#6) MWRDRF has requested three printed copies of the proposal. As we slowly emerge from the pandemic, delivery services are not yet reliable, frequently missing what was formerly guaranteed delivery times. Given the environment, is MWRDRF willing to modify your requirement for paper delivery by either eliminating it entirely or by allowing that as long as the electronic copies arrive timely that the paper copies can follow (timely postmarking, etc.)?
	Paper copies should arrive within five business days of the electronic submission, as long as the electronic copies arrive on time.
4.	01 RFP Information, 070 Contractual Terms and Conditions, 001 Failure to Agree, page 19. MWRDRF states in this section that bidders must agree to the terms in the Sample Contract provided or risk disqualification yet has referenced contract negotiations in other RFP sections. Can bidders assume that contract negotiations (including clarifying language) will be conducted in good faith as described elsewhere in the proposal?
	Yes, the Sample Contract included in the RFP is the model language. Once a finalist is selected, MWRDRF will negotiate in good faith.
5.	01 RFP Information, 070 Contractual Terms and Conditions, 003 Sample Contract, p. 21 Does MWRDRF prefer that a redlined version of the Sample Contract be provided, or do you prefer that responses be written separately?
	Yes, MWRDRF prefers all modifications to the model should be marked in redline.



6.	<p>02 MWRDRF Information, 010 MWRDRF Overview, p. 20 Please describe the current PAS solution, including any scanning equipment and any systems with which the new PAS solution will need to integrate.</p>
<p>The current PAS solution is named Pension Board Management System (PBMS). It is a highly customized product developed locally by Novitas Business & Technology Solution, formerly known as JC Consulting. Novitas has implemented this product at the Cook County, Municipal of Chicago, Laborers of Chicago, and the MWRDRF Funds. The MWRDRF currently has scanning to introduce images into the application. We own two Fujitsu scanners to scan. The images are processed through Paper Stream. Meta data for the images are contained in the database. The Fund’s intent is not to maintain this system, but to implement a broad imaging system, where documents as images can be introduced into the database by means other than the scanned image.</p> <p>PBMS is insulated from outside systems. Communications to and from outside sources occur through the production or loading of data extracts.</p>	
7.	<p>02 MWRDRF Information, 010 MWRDRF Overview, 007 Resource Constraints, p. 22 Given the resource information provided, are there any periods during which MWRDRF prefers that no system releases be made? If so, please provide those dates.</p>
<p>No system releases should be made in January. Additionally, we produce a monthly payroll. System releases should be made no later than one week after the payroll cycle is complete.</p>	
8.	<p>04 Scope, 020 General Scope, p. 38 The RFP does not provide direction on the type of response you prefer for the General Scope section. Please describe how you would prefer that vendors respond. If you are seeking a response, could MWRDRF please provide the requirements as an Excel spreadsheet?</p>
<p>The bidder should describe how your base product will address these functions. Bidder shall identify any items that are not part of base product and confirm that the complete scope in 04 Scope, 020 General Scope, p. 38 will be provided with your solution. Bidders must use the Excel spreadsheet provided with the Q&A.</p> <p>Note: Bidder must pay special attention to the salary calculations described RFP Appendix that has Administrative Rules.</p>	
9.	<p>04 Scope, 020 General Scope, Conversions p. 38 Please describe efforts by MWRDRF in the last several years to cleanse data. Please describe any current pain points with the data/data structure and any challenges you expect with data conversion. If MWRDRF is engaging a data cleansing vendor, please describe the extent and expected timeline of those services.</p>
<p>MWRDRF is undergoing review for the scope and strategy of our data cleansing project. We hope to issue an RFP for these services in August. We anticipate that a normalized, cleansed database will be available by the February 1, 2022, anticipated PAS project start date. Pain points for our data include duplicate and orphaned data, and weak database documentation.</p>	
10.	<p>04 Scope, 020 General Scope, Employer Contribution Reporting p. 38 In the Purpose Overview on p. 7, MWRDRF describes goals for an employer experience that includes immediate validation of reports along with edits/validations that will ensure data accuracy. The General Scope section includes a single, general requirement. Please provide</p>



	more details about your expectations for employer reporting, new member enrollment and the employer experience.
Please respond by providing information on your standard employer facing portal.	
11.	04 Scope, 030 Detailed Scope, p. 41 The RFP does not provide direction on the type of response you prefer for the Detailed Scope section. Please describe how you would prefer that vendors respond. If you are seeking a response, could MWRDRF please provide the requirements as an Excel spreadsheet?
Bidder shall identify any items that are not part of base product and confirm that the complete scope in Section 04 Scope, 030 Detailed Scope, p. 41 will be provided with your solution. Bidder shall use the Excel spreadsheet provided with the Q&A. Note: Bidder must pay special attention to the salary calculations described RPF Appendix that has Administrative Rules	
12.	04 Scope, 030 Detailed Scope, p. 41 Please describe any General Ledger or payroll systems that the PAS vendor will need to integrate with.
MWRDRF uses Great Plains.	
13.	04 Scope, 030 Detailed Scope, 001 General Technical Requirements, #13, p. 41 Please describe any existing user access/single sign-on methods that the PAS vendor will need to integrate with.
MWRDRF will prefer Windows authentication. Existing is Windows with caveats.	
14.	04 Scope, 030 Detailed Scope, 001 General Technical Requirements, #14, page 41 MWRDRF has set the expectation that the PAS system will provide an average response time to the desktop of less than three seconds. The RFP does not require the vendor to provide desktop or infrastructure equipment or support. Does MWRDRF agree that the vendor cannot be held accountable for the response times of MWRDRF-owned elements of the solution?
MWRDRF agrees.	
15.	04 Scope, 030 Detailed Scope, 003 – Web Self Service Requirements, #38, p. 44 This requirement is “to allow access to additional forms if a signature form is on file.” Please describe what is meant by this requirement by perhaps providing an example.
No WSS access will be permitted to an annuitant who has not submitted a signature card.	
16.	04 Scope, 070 Bidder’s Implementation Schedule, page 54 Please describe any preferences you have for functionality roll-out (e.g., employer first, last, etc.), any dates that can affect the delivery of the system (e.g., software becoming unsupported, other new systems coming on), and any other dates that are important for your overall schedule and schedule preferences. Are there any external pressures that affect any part of delivery?
Rollout of the product should be staff-facing, followed by employer-facing, and concluded with WSS. There are no known external pressures at this time.	
17.	Sample Contract (Exhibit 7 – Proposed Contracts), p. 1



	MWRDRF states that the attached Proof of Concept Agreement and System License Agreement will be subject to negotiation with the selected vendor. Does MWRDRF prefer that redlined versions of these documents be submitted with the proposal along with the sample contract?
Yes. All modifications should be redlined.	
18.	Clarifying Provided Materials There is a document labeled <i>3.0 Proof of Concept Schedule A</i> and another labeled <i>2.0 Appendix A to Proof of Concept</i> . Upon opening, the first is a requirement for a Statement of Work; the second is a set of definitions. Those definitions are different from the definitions provided in document <i>5.0 Appendix A to the System License Agreement</i> . The term Proof of Concept appears three times in the Sample Contract provided. Please confirm that there is no requirement for bidders to produce a Proof of Concept. Please clarify how the two different definitions documents should be applied.
There is no required proof of concept.	
19.	Clarifying Provided Materials Regarding <i>3.0 Proof of Concept Schedule A</i> (SOW requirement), does MWRDRF prefer that bidders provide a draft SOW with the proposal, or do you intend that the SOW will be developed with the finalist vendor only?
We are not asking for a proof of concept.	
20.	System License Agreement, Attachments Please confirm that MWRDRF wishes bidders to include with their proposals Attachments B – E. A format has been provided for Attachment C, Vendor Key Personnel. Please confirm that there is no required format for Attachments B (Payment Schedule), D (Initial Implementation Plan) or E (Support and Maintenance).
Please note this a “Sample Contract” in the RFP. Bidder is to provide a redlined version to indicate any wording that Bidder would not accept. Attachments in the Sample Contract are not required to be submitted with Bidder’s proposal. As part of the selection process, MWRDRF will review the redlines for each Bidder. Once an MWRDRF finalist is selected, MWRDRF will negotiate in the contract with the selected Bidder in good faith.	
21.	System License Agreement, Attachments In the provided document, 6.0 System License Agreement Attachments A-E, Exhibit 8 refers to a document that explains the current SDLC methods. When will this document be provided to bidders?
Please note this a “Sample Contract” in the RFP. Bidder is to provide a redlined version to indicate any wording that Bidder would not accept. Attachments in the Sample Contract are not required to be submitted with Bidder’s proposal. As part of the selection process, MWRDRF will review the redlines for each Bidder. Once an MWRDRF finalist is selected, MWRDRF will negotiate in the contract with the selected Bidder in good faith.	
22.	Section 01 – RFP Information, 010 Purpose of this RFP, 001 – Purpose Overview, page 8 (2nd to last bullet “Survivor Benefit Eligibility, Calculation and <u>Payment</u>”), and Section 04 – Scope, 030 Detailed Scope, 003 Web Self-Service, page 44 #42, and Section 06 – Attachments, 030 Attachment 3, page 67 #86



	Does MWRD expect the PAS/vendor to make the pension payments (ACH + checks + rollovers), withhold and remit taxes/deductions & generate the 1099's? Or does the PAS need to generate and send a file with payment instructions (starts/stops/changes for payment amounts/taxes/banking/deductions/demographic changes) to MWRD's existing trustee/custodian/bank/check writer/pension payer? Please clarify if pension payroll services are included in the scope of this RFP.
Yes, the Fund produces checks and ACH files internally, as well as 1099Rs.	
23.	Section 04 – Scope, 030 Detailed Scope, 001 General Technical Requirements, page 41 #13 Describe MWRD's expectations are for Single Sign On (SSO). What environment/Application/website will MRWD be using SSO from, in order to get to the PAS? What is on the other end of the SSO that is accessing the PAS?
Windows authentication for all systems is ideal.	
24.	01 – RFP Information: 030 RFP Instructions – 001 Response Submissions, p. 8 For RFP proposal delivery, could MWRDRF provide the maximum file size your email server will accept?
The maximum message size is 50MB. Bidders may need to send more than one email if any files exceed 50MB. We highly encourage bidders to zip files as needed.	
25.	01 – RFP Information: 070 Contractual Terms and Conditions, p. 19 Can we submit our sample contract to be considered as a starting point for negotiation?
MWRDRF ask bidders to start with our sample contract included in the RFP.	
26.	04 – Scope: 030 Detailed Scope – 006 Testing Requirements, p. 47 The RFP states, "Shall include in the Project Plan a minimum of 20% of the overall project schedule for the execution of user acceptance testing." Please provide further detail for this figure and how it was calculated. We assume that "overall project schedule" refers to the period of time spanning project start through go-live, is this assumption correct?
Good testing yields good product. 20% is the minimum to be afforded to testing.	
27.	04 – Scope: 030 Detailed Scope – 006 Testing Requirements, p. 47 The RFP states, "Shall perform end-to-end business process testing, including interfaces and integrations..." Please clarify if the Vendor is expected to complete testing of the integrations within MWRDRF's partner/external systems.
Fund Staff is responsible for completion of testing integrations with any partner or external systems.	
28.	01 – RFP Information; 030 – RFP Instructions; 003 – Proposal Response Format, p. 11-12 Concerning the format requirements listed in #6, "b." states that double spacing must be used for text on all pages of the response. In the interest of offering a concise response, would line spacing of 1.08 to 1.25 be acceptable for the entire response as opposed to line spacing of 2.0 (double spacing)?
Use double spacing per the RFP.	
29.	01 – RFP Information; 030 – RFP Instructions; 003 – Proposal Response Format, p. 11-12 Concerning the format requirements listed in #6, "b." states that double spacing must be used for text on all pages of the response. In the interest of offering a concise response (and if the



	answer to our Question #1 is “no”), may we use line spacing of 1.08 as opposed to line spacing of 2.0 (double spacing) for resumes and for individual cells in tables only?
Use table format when called for in the RFP. Text spacing within the table may be single space.	
30.	01 – RFP Information; 030 – RFP Instructions; 004 – Cost Response Format, p. 12-13 Concerning the format requirements listed in #6, “b.” states that double spacing must be used for text on all pages of the response. In the interest of offering a concise response, would line spacing of 1.08 to 1.25 be acceptable for the entire response as opposed to line spacing of 2.0 (double spacing)?
Use double spacing per the RFP.	
31.	01 – RFP Information; 030 – RFP Instructions; 003 – Cost Response Format, p. 12-13 Concerning the format requirements listed in #6, “b.” states that double spacing must be used for text on all pages of the response. In the interest of offering a concise response (and if the answer to our Question #3 is “no”), may we use line spacing of 1.08 as opposed to line spacing of 2.0 (double spacing) for individual cells in tables only?
Use table format when called for in the RFP. Text spacing within the table may be single space.	
32.	Do the formatting requirements also apply to the min qualifications response?
Yes, all bidders must follow the formatting response as described in the RFP.	
33.	Regarding the company references and company list on page 34 in Section Bidder Qualifications 040 Retirement Clients and 050 Company References the table on page 34 is very similar on page 33, can we replace and add a couple items that are on page 33 to the reference information? Since on both we need to list all the customers in the last 10 years and there will be duplication we can be more concise by listing one table?
Please follow the formatting and submission instructions in the RFP.	
34.	Referring to question 34, is it necessary to include references to all clients for the past 10 years?
Yes, include references as instructed in the RFP.	
35.	For question #15, regarding signature form on file proof of life, if one has been solicited and not returned is the intent here is to restrict or have a different level of access for the individual who have not returned the form?
The goal is to disable any account for any individual for whom we have not received the signature form.	