1. What is the current data cleansing process? Is Vitaliy currently the only resource?

   This will be the Fund's inaugural data cleansing project. Vitaliy, the Fund's programmer analyst, will be a technical resource for the selected vendor. Additionally, other staff will be available as subject matter experts.

2. Can you provide additional detail related to the business rules currently in place in the legacy systems?

   For the scope of this project and RFP response, "business rules" can be construed as data validation. Types of analysis to be performed by the selected data management services vendor will address questions such as: Do all data items in a table adhere to the expected format and data type for that table or field? Is the data length for this data field correct? Is an entry expected in a field and yet absent? Is an entry not expected in a field, yet present? Etc. The Fund will also be looking for best practices input from the selected vendor.

3. What is the current data collection process?

   Data enters the current PAS, Pension Board Management System (PBMS), through both keystroke entry and electronic data file loads. Data sources include but are not limited to: forms completed by members and dependents; and electronic data files from: the MWRD; the Fund's bank; and the reciprocal data match file from the State Universities Retirement System.

4. What percentage of the data is redundant or duplicated? Can this be quantified?

   Yes, the percentage of redundant or duplicated data can be quantified. Quantifying it will be incumbent upon the selected vendor for this project.

5. What feature(s) will be the most important/valuable in the new PAS application?

   As stated in the PAS RFP the Fund's goals for the new PAS application are:

   - Improve the MWRDRF's security, data integrity, and internal controls.
   - Replace aging technology infrastructure and position the MWRDRF to meet its technology needs through the next decade and beyond.
   - Streamline and improve operational business processes.
   - Improve customer service and benefits delivery.
   - Improve the MWRDRF's use of modern technology by offering web, and mobile-based services that keep pace with other service industries.
   - Streamline manual and paper tasks into automated workflows
   - while integrating paperless options.
   - Provide self-service options in the Member Portal and Employer Portal.

6. What key operational insights are you looking to gain from the modernization effort?

   The goal of modernization efforts, both the new PAS and data cleansing, is not to gain operational insights. The goal of these projects is to improve data processing accuracy, efficiency, and automation through the implementation of quality software packages.

7. Has there been a budget established for the engagement?

   No, but decisions will incorporate reasonableness of cost.

8. Has a project schedule been developed that considers the introduction of a new PAS and other critical events / milestones / timeframes?

   The new PAS project timeline will be developed by the project manager for the selected PAS vendor. The vendor selected for data management services will be expected to meet data migration deadlines set by such project manager.

9. In Section 1 it states that we must submit (1) original and (1) PDF version of both the technical and fee proposal and that the paper submission must be received w/in 5 days of the electronic. However, under Section 2 states that NO PROPOSALS WILL BE ACCEPTED AFTER 9/14 4:30 pm. Please confirm that both electronic and hard (original) copies do not need to be submitted on the same day.

   To clarify, the electronic copy is due on September 14, 2021. The paper copy should be received by September 21, 2021, five (5) business days after the electronic submission is received.

10. How much oversight / setting direction will the MWRDRF have during the project?

    The MWRDRF will have complete oversight over the project because it is obligated to protect its member data. The goal is to partner with a data management service provider that will offer objective insight into MWRDRF data and make recommendations for MWRDRF staff to consider with respect to the analysis, cleansing, and migration of its data.

11. Has the new PAS been identified and, if not, is there a publishable list of finalists?

    The field of possible PAS developers was announced at a public meeting on July 28, 2021. The vendors who submitted minimum qualifications, a requirement for vendors, were: LRS; Tegrit; and CBIZ.

12. How long after the production date does the contractor(s) need to be actively monitoring and correcting the data in the new datastore?

    Although Fund staff can't predict future outcome of the PAS build, it is anticipated that active monitoring will conclude at the time the PAS goes live. The data management service provider should remain available to the Fund as a consultant on an hourly basis for potential data issues or discrepancies for at least a year after the go-live date.

13. Do the contractors ever update the production legacy datastore? The new datastore?

    We do not anticipate the "cleansed" data to return to our production environment. The purpose of this project is to prepare the best possible baseline data for migrating to the new PAS. We expect the process of data cleansing to produce a datastore independent of the legacy database. However, the new datastore will need to be iteratively/periodically updated via the automated or on-demand tools created by the contractor with newly "cleansed" data from the legacy database until the final cutover to the new PAS.

14. Regarding Section 1: Request for Proposal, 1. Submission of Proposals, please confirm the electronic copy is due on September 14 with the hard copy due by September 19.

    See question #9.

15. In Section 2: Special Provisions Information, 1, Proposal Response Sequential Order, it states "Contractors are required to keep their proposal response in the same sequential order that is referenced in Section 5, Proposal Submission Requirements." In the RFP document, Section 5 is titled Responsibilities of Contractor and Section 6 is titled Proposal Submission Requirements. Please clarify which section the proposal response should follow.

    For your response, please follow the structure laid out in Section 6, Proposal Submission Requirements.

16. In Section 5, Item 6, Contractor Requirements/Qualifications (page 19), it is unclear which of the numbered items that follow must be written to in the response and which are requirements of the contract. Please clarify whether all the numbered items from 7-9 must be worked into the organization specified in the submission requirements and whether the contractor can determine which order and which sections those items are addressed.

    For your response, please follow the structure laid out in Section 6, Proposal Submission Requirements.

17. Was an outside source used to prepare the RFP? If so, who was that source, and will they be allowed to bid on this RFP?

    The RFP was prepared internally by MWRDRF staff using various source documents.

18. Can you provide any information regarding the budget for this project?

    See question #7.

19. Can MWRD Retirement Fund provide a list of all questions submitted and responses resulting from this RFP as well as a list of companies that made inquiries?

    We have aggregated the questions. Herein are the answers.

20. When is the project anticipated to start?

    The project is anticipated to start in the Fall of 2021, subject to successful contract negotiations.

21. How long is the project anticipated to last?

    The project is anticipated to start in the Fall of 2021 and to conclude after the successful go-live of the new PAS. It may be expected that the data management services contractor will have a higher level of engagement early in the project with reduced involvement as the project progresses. The hope is for the contractor to develop data management tools for Fund use that will enable us to work independently to resolve data migration issues as the PAS project progresses.

22. Has a vendor been selected yet for the new PAS application? If so, can we see the proposal/solution they submitted, especially technical specifications, and if not selected yet can we get a copy of the RFP that went out, or is going out, for the new PAS?

    Vendor selection for the PAS project is scheduled to occur in December. The PAS RFP may be found here: http://mwrdrf.org/media/2578/1-mwrdrf-pas-rfp-final.pdf

23. What different formats is the data currently in? The mention of several sources was made in the RFP concerning the legacy data.

24. What format would the cleaned data need to be delivered in?

We expect the process of data cleansing to produce a datastore independent of the legacy database. Our preferred format is a MS SQL Server database.

25. Have previous data cleanup/conversions been attempted in the past?

No cleanup attempts have been made in the past. Data was converted from DB2 to Oracle in 2002, and from Oracle to SQL Server in 2007 – 2009.

26. Business rules were mentioned on Page 10, Section 4, #2 – Does MWRDRF have a list of specific rules to adhere to?

 See question #2.