

Metropolitan Water Reclamation District Retirement Fund



Request for Proposal

WEBSITE DEVELOPMENT AND SERVICES

Issued November 27, 2024

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I. SUMMARY

This Request for Proposal (“RFP”) is being issued by the Metropolitan Water Reclamation District Retirement Fund (“MWRDRF” or the “Fund”) to solicit proposals from qualified Website Design Consultants (“Bidder” or “Consultant” or “Firm” or “Respondent”), for website services, including support, maintenance, building pages, and hosting. The Respondent chosen will be responsible for leading the process and executing all services related to hosting and supporting the website. The successful completion of the project work as described in this RFP will be: design, development, hosting, ongoing support, technical maintenance of the website, and the ability for the Fund’s staff to manage, update, and expand site content with a provided content management solution.

All requirements in this document are subject to change.

If you are interested in the proposed engagement, we welcome proposals from qualified firms. Respondents must satisfy the qualifications and requirements outlined herein.

II. BACKGROUND

The MWRD Retirement Fund (MWRDRF) is a defined benefit, single employer benefit plan that was established in 1931 by an act of the Illinois General Assembly under Article 13 of the Illinois Pension code [40 ILCS 5/13-101 et seq.] to provide disability and retirement benefits to qualified employees of the Metropolitan Water Reclamation District of Greater Chicago (MWRDGC).

The MWRDRF is governed by a seven-member Board of Trustees. The Executive Director, who reports directly to the Board, manages the day-to-day operations of the Fund. The staff consists of 11 employees.

More detailed information on MWRDRF and its finances can be found in the 2023 Annual Comprehensive Financial Report (ACFR) posted on the MWRDRF website at www.mwrdrf.org. Go to the “Financial and Investment Related” tab on the home page and select Financial and Investment Reports.

III. SCOPE OF WORK

The MWRDRF is seeking proposals from qualified vendors to design, develop, host, support, and provide maintenance and updates as needed/requested to our website, MWRDRF.org. We seek to develop a modern, accessible, mobile-friendly, searchable website that allows members and other interested parties to easily find relevant information.

Your proposal response should describe any services or options not included in the scope of this engagement that your firm may offer to provide more complete and thorough services. The following information should be used to determine the scope of this project and provide applicable pricing for each requested deliverable.

The MWRDRF reserves the right to select all or some of the website design services listed below that best match its needs and budget for the project.

A. Background

The MWRDRF's website is the first point of contact for many members and other interested parties. It is also where the Fund presents information to the world-at-large and a place where the site's visitors can learn more about the Fund operation and services.

The present website was launched in 2009. The technology employed is Umbraco. There have been no major site redesigns.

B. Current Features

At present, the website provides the Fund's information including announcements, Board Of Trustees listing, meeting agendas and minutes, Fund's staff listing with contact information, benefit descriptions, non-interactive view of the Fund's services, financial performance, and other materials.

C. Audience

There are three main audiences for the MWRDRF's website.

- i. Active and Inactive Members**
Current and former employees of the Metropolitan Water Reclamation District of Greater Chicago (MWRDGC), who have contributed to the Fund. These members seek information explaining how the Fund works, how to claim a benefit, and the financial status of the Fund.
- ii. Retired Members**
Former employees of the MWRDGC who are now receiving an annuity payment from the Fund. This group also includes survivors of deceased members who are receiving annuities. These members primarily look for information regarding health insurance, timing of pension payments, and the financial status of the Fund.
- iii. Non-Members**
This group is disparate and could include investment advisors, members of the public, reporters, and others. These individuals primarily seek information regarding the financial state of the Fund, RFPs that may be available, and Board meeting agendas and minutes.

D. Scope

The website design, development, support, maintenance, and hosting will encompass the content of MWRDRF's existing website. Once completed, we will add content and features to better serve our audiences. MWRDRF's current hosting provider is Umbhost (umbhost.net), but our preference would be to host the website within the Fund's Microsoft Azure presence. Please indicate if you

can accommodate hosting under our current Azure tenant or suggest hosting using an alternate provider and the rationale for the alternative.

E. Deliverables (*Estimated details/dates contingent on proposed project plan timeline*)

Deliverables	Details
Site Design	Work with Fund's staff to perform visual and functional design of the website.
Sandbox Environment	Create and maintain a sandbox environment for testing and content review purposes.
Content Management Environment	Create and maintain the non-technical user-friendly interface as a part of the sandbox environment.
Site Development	Develop the production website.
Site Launch	Make the website available on the World Wide Web.

F. Current Website Features

Features currently available on the website are listed below:

Website Features	Details
Search	Text based search of the published pages
Umbraco Content Management System (CMS)	Multiple "webmasters" with access level differentiation
Site Analytics	Connection to <i>Google</i> Analytics or self-reporting tool/ module
Font size feature	Different web font size options for users
Widget-like editable components	
Optimized with SEO best practices	
Staff Directory Module	Listing for Board, Leadership, and Staff

IV. PROJECTED TIMELINE

EVENT	DUE DATE
RFP Distribution	November 27, 2024
Written questions due from Respondents	January 6, 2025
Questions and Responses posted to www.MWRDRF.org	January 10, 2025
Proposal Due Date	January 28, 2025
Finalist Interviews	Week of February 3, 2025
Vendor selection presented to the Board of Trustees	February 26, 2025

V. CONTACT

Any questions concerning this RFP must be directed to:

Names	Mary Murphy, Operations Manager Vitaliy Bunimovich, IT Supervisor
Address	MWRD Retirement Fund 111 East Erie Street Suite 330 Chicago, IL 60611
Contact Information	<i>Vitaliy Bunimovich</i> : 312-751-3284, bunimovichv@mwrdrf.org <i>Mary Murphy</i> : 312-751-3220, murphym1@mwrdrf.org

VI. TERMS OF ENGAGEMENT

The terms of the engagement will be governed by the negotiated contract or agreement as limited by the Illinois Pension Code and MWRDRF's administrative rules.

VII. SUBMISSION GUIDELINES

In order to be considered for selection, proposals must be received via email, in PDF format, by Mary Murphy at murphym1@mwrdrf.org with a copy to Vitaliy Bunimovich at bunimovichv@mwrdrf.org by 4:30 p.m. on **January 28, 2025**. Paper submissions will be rejected as non-conforming. An email confirmation will be sent to the Respondent upon receipt of the proposal.

VIII. PROPOSAL CONTENT AND FORMAT

All information requested in the RFP must be addressed in the Respondent's proposal. Proposals should provide a concise explanation of Respondent's qualifications and the proposed services to be rendered. Emphasis should be placed on completeness and clarity of content. Each proposal must be submitted in response to categories A through M outlined below and must be clearly labeled as such.

A. Cover Letter

Briefly state the Respondent's understanding of the work requested and a statement why the Respondent believes it is qualified to perform the engagement. The letter should be signed by the representative of the Respondent authorized to contract on behalf of the Respondent.

B. Title Page

- a. Date
- b. Subject
- c. Respondent's name and chief executive officer (or the equivalent)
- d. Respondent's address
- e. Respondent's website address
- f. Respondent's phone number
- g. Contact's name
- h. Contact's title
- i. Contact's phone number
- j. Contact's email address

C. Table of Contents

D. Project Plan

- a. Address the various tasks, services, and deliverables outlined in Section III. Scope of Work and describe the specific approach that will be taken in performing each task or service or providing each deliverable.
- b. Describe the Respondent's staffing for the engagement.
- c. Describe any deliverables or services, not included in Section III. Scope of Work that the Respondent recommends.
- d. Indicate the location where the work on this engagement will be performed.
- e. Provide a project timeline complete with estimated hours and completion dates.
- f. Provide no fewer than three (3) samples of similar development work completed by your firm.

- g. Provide information on your documentation process for site migration, maintenance, updates, upgrades, enhancements, and new features.
- h. Describe the cyber security environment for websites you design and the customer service and support you provide after a website is live.

E. Billing

- a. Provide a fixed-price bid based on an estimate of required time, resources, and materials for the work outlined in Section III - Scope of Work.
- b. Provide an estimate for ongoing site support.
- c. MWRDRF expects the lowest rate charged by Respondent for its employee benefit plan, governmental, and non-profit clients.

F. Firm's Background, Qualifications, and Experience

- a. Briefly describe Respondent's background and history.
- b. Describe Respondent's ownership structure. Please disclose the names and addresses of:
 - (i) the Firm;
 - (ii) any entity that is a parent of, or owns a controlling interest in, the Firm;
 - (iii) any entity that is a subsidiary of, or in which a controlling interest is owned by, the Firm;
 - (iv) any persons who have an ownership or distributive income share in the Firm that is in excess of 7.5%; or serves as an executive officer of the Firm.

An "executive officer" shall mean any president, director, vice-president in charge of a principal business unit, division, or function (such as investment consulting, marketing, or administration), and any other employee who performs a policy-making role, regardless of the title given to their position.

- c. It is the policy of the Fund to encourage vendor participation involving Minority Business Enterprises, Women-owned Business Enterprises, or a Business Owned by a Person with a Disability, as such terms are defined in the Illinois Business Enterprise for Minorities, Women and Persons with Disabilities Act, 30 ILCS 575. State if the Respondent is a MWDBE firm and provide certification.
- d. Provide resumés for the key project staff. MWRDRF expects a reasonable notice of and reserves the right to approve the replacement of key project staff.
- e. Provide the size of the Firm including number of offices and number of full-time employees
- f. Provide details on your Firm's employee benefit industry experience. How many clients do you currently service? How many of those are employee benefit plans? How many are governmental pension plans?
- g. Have you added or lost any clients in the last 5 years? If so, please indicate the stated reason(s) or circumstance for termination. Of the clients added or lost, how many were employee benefit funds?
- h. State if the Respondent plans to use subcontractors for this project. If so, identify the subcontractors, the nature of the project tasks assigned to them, and the amounts to be received by the subcontractors. Respondent must provide the subcontracting agreements to the MWRDRF.
- i. Disclose any known professional or personal relationships Respondent or its employees or contractors may have with individual MWRDRF Board members and/or Fund staff.
- j. Provide references for three clients for the past 5 years and note if they are public sector or ERISA fund clients.

G. Insurance, Liability, Confidentiality, and Litigation

- a. Describe your security and protection measures and list all related policies and procedures.
- b. Provide proof of Errors and Omissions, Cyber and General Liability insurance. Does coverage for liability, due to your negligence, continue for a period following termination of the contract? If so, for how long?
- c. Have any notice of potential claim or claims been made to you or to your insurance carrier in the past ten years? If so, please describe such claim(s).
- d. Is your Firm aware of any claims or notices of potential claims at this time? If so, please describe.
- e. Please describe your quality assurance process and procedures.
- f. Indicate whether your organization is currently involved or has been involved in a lawsuit in the last ten (10) years, involving any services provided to clients. Provide details, including description of the lawsuits, dates, and outcomes.
- g. Indicate whether your organization, its related entities, affiliates, principals, and/or officers have been a party to any material civil or criminal litigation, or subject to investigation, disciplinary action, or regulatory review. Provide details, including dates and outcomes.
- h. Describe any threatened or potential litigation in which your Firm may be involved.
- i. Will your Firm agree to indemnify the MWRDRF and its Trustees for any losses from the negligence, errors, omissions, or wrongful acts of your Firm, your employees, contractors, or third-party vendors?

H. IT and Cyber Security

- a. Describe your Firm's disaster recovery and business continuity plans.
- b. Provide the most recent date and the numbers of times you have practiced and tested your disaster recovery procedures in the past five (5) years, and the results of those exercises.
- c. Describe your back-up capabilities and/or offsite location, in the event your primary office location was inaccessible.
- d. Describe the Firm's security environment. Specifically cover the physical, digital security, and policy measure safeguards that you have put in place to control access to the websites that you host and design for clients.
- e. Do your Firm's information technology systems meet or exceed industry best practices related to cyber-security, including but not limited to the U.S. Department of Labor's Cybersecurity Program Best Practices and the requirements of the State of Illinois Cybersecurity Strategy and the NIST Cybersecurity Framework? If not, please explain why.
- f. How does your Firm defend against cyber-attacks?
- g. Have you had your security assessed by a third party? If so, when was this last completed and by which provider?

- h. Has your Firm ever had a data security breach? If so, describe the incident as well as the corrective actions.
- i. Have you had a cybersecurity audit? If so, provide a copy of your most recent AICPA Service Organization Control 1 and/or 2 reports.

I. Sample Contract or Agreement

- a. Please provide your standard sample contract or MSA for the services provided by your Firm, which is subject to negotiation.

J. References

- a. Please provide three client references for projects similar to that requested in this RFP. Include the reference name, title, entity, address, telephone number, and description of the services provided.
- b. In providing such information, you consent to and release MWRDRF from any liability that may arise from contacting your references and information gathered from those references.

K. Ethics and Conflicts of Interest

- a. All Respondents must comply at all times with the Fund's Ethics Policy, which can be found on the Fund's website (<https://mwrdrf.org/investment-and-financial-reporting/policies/>).
- b. Please identify any potential conflict of interest in providing services to the Fund. Describe the Firm's process for handling conflicts of interest.

L. Required Disclosures

- a. All Respondents must complete the Diversity chart included in this RFP.

M. Exhibits and Attachments

- a. Any additional information or exhibits appropriate for MWRDRF's consideration may be included under this category.

IX. WRITTEN QUESTIONS

Prospective Respondents who have questions regarding this RFP may email the contacts listed above by the due date listed in the timeline above for written questions. Please reference “Website Services RFP Questions” in the subject line of the email. The questions (without identification of the questioner) and the answers will be posted on the MWRDRF website according to the above timeline.

X. PROPOSAL EVALUATION

The following guidelines will be used to analyze and evaluate all proposals. MWRDRF reserves the right to evaluate all factors deemed appropriate.

A. QUALIFICATIONS

To be selected for this engagement, the Respondent must demonstrate that it can meet the requirements of the RFP, and the scope of work contained in the RFP.

The Respondent must be regularly established in the industry of designing and developing websites and must provide detailed information in response to Section VIII (f) Firm’s Background, Qualifications, and Experience. The MWRDRF may request information substantiating the above requirements.

Failure to provide this information may result in a Respondent’s proposal being declared non-responsive.

B. REVIEW OF PROPOSALS

- a. Fund staff will evaluate all proposals received.
- b. The Fund will determine if Respondents meet the mandatory requirements listed below:
 - i. The Respondent has no conflict of interest with respect to any other work performed by the Respondent.
 - ii. The Respondent must demonstrate that it can meet the requirements of the RFP, and the Scope of Work contained in this RFP.
 - iii. The Respondent must adhere to the instructions in this RFP.
 - iv. The Respondent must follow the proposal content and format outlined in Section VIII.
 - v. The Respondent must complete the Diversity chart requested in Section VIII(l).
- c. Factors to be considered include, but are not limited to:
 - i. Qualifications to perform the services requested
 - ii. Relevant experience
 - iii. Work samples
 - iv. Utilized technologies
 - v. Cost.

Any contract award is ultimately a decision of the Board of Trustees and is not to be based on the evaluations, scoring, or staff recommendations.

This RFP is not an offer of a contract. Acceptance of a proposal does not commit the MWRDRF to award a contract to any Respondent, even if the Respondent satisfied all requirements stated in this RFP. Publication of this RFP does not limit the MWRDRF's right to negotiate for the services described in this RFP.

The MWRDRF reserves the right to choose to not to enter into an agreement with any of the Respondents to this RFP.

XI. FINALIST PRESENTATIONS

After the proposal submission due date, the MWRDRF will contact the top-ranked Respondents to set up a meeting, approximately one hour in length, with the Fund staff via videoconference. At these meetings, Respondents must be prepared to provide a brief presentation on their services as outlined in their proposal and answer any questions regarding their proposal.

XII. RFP WITHDRAWAL OR MODIFICATION

Proposals may be withdrawn or modified by a written or email request prior to the RFP due date. The MWRDRF may, by written notice to all Respondents, cancel, postpone, or amend the RFP prior to the due date. If the MWRDRF decides, at its sole discretion, that the revision or amendment will require additional time for response, the due date will be extended for all Respondents.

XIII. INCOMPLETE PROPOSALS

The MWRDRF reserves the right to request additional information or to reject the proposal outright if the information provided in a Respondent's proposal is deemed to be insufficient for evaluation. False, incomplete, or non-responsive statements in connection with a proposal may be sufficient cause for its rejection. The evaluation and determination of the fulfillment of the requirements will be determined by the MWRDRF.

Any proposal received at the designated email after the required time and date specified for receipt shall be considered late and non-responsive. Late proposals will not be evaluated for award.

Proposals submitted shall be valid for one hundred twenty (120) days following the closing date noted above. The MWRDRF and the Respondent may extend this period by mutual written agreement. If a solicitation is cancelled before the due date, the offer will be returned to the Respondent who submitted the response.

XIV. SELECTION OF WINNING BID

After staff review of all proposals a recommendation is expected to be made to the MWRDRF Board Of Trustees for their approval at the February 26, 2025, meeting.

XV. REIMBURSEMENT FOR PROPOSAL PREPARATION

The MWRDRF will not reimburse any expenses incurred in responding to this RFP including, but not limited to, the costs of preparing the response, providing any additional information, or making a presentation or presentations. The MWRDRF reserves the right to retain all proposals submitted.

XVI. QUIET PERIOD

During the RFP review period (which begins on the date the RFP is posted on the MWRDRF's website) to and until a contract is executed, there shall be no communication between Respondents and the MWRDRF's Board members or Fund staff (other than the RFP contact listed in Section V or his or her designee) regarding any product or service related to the search. Respondents may communicate with the listed RFP contacts solely regarding administrative questions relating to the procurement process. All other questions must be asked through the RFP question and answer process.

The quiet period shall not prevent customary respondent due diligence, initiated by the MWRDRF, or communications with a current service provider who happens to be a candidate, provided that any such communication must be in the ordinary course of business and necessary for the provision of current services provided by such service provider. Discussions relating to the pending selection are strictly prohibited.

XVII. RFP LIMITATIONS AND CONDITIONS

- A.** This RFP does not commit the MWRDRF to award an agreement or procure services of any kind whatsoever. The MWRDRF reserves the right, in its sole discretion, to negotiate with any or all Respondents considered, or to postpone, delay, or cancel this RFP, in whole or in part. The MWRDRF may terminate discussions, in its sole discretion, or select another finalist. The MWRDRF reserves the right to award an agreement or agreements based upon the proposals received. The Respondent should not assume that there will be an opportunity to alter or amend its proposal.
- B.** The MWRDRF may request that Respondent clarify the content of the proposal. Other than for purposes of clarification, no Respondent will be allowed to alter or amend its proposal after the RFP due date.
- C.** All materials submitted in response to this RFP shall be the sole property of the MWRDRF.
- D.** The MWRDRF reserves the right to reject or cancel in whole or in part at any time, all proposals received; to waive minor irregularities; to negotiate in any manner necessary to best serve the MWRDRF and to make a whole award, multiple awards, a partial award, or no award.

- E. The MWRDRF reserves the right to reject any or all offers and to discontinue this RFP process without obligation or liability to any potential vendor.
- F. The MWRDRF reserves the right to reject the proposal of any Respondent who is not currently able to perform the contract. The MWRDRF reserves the right to award a contract, if at all, to the Firm which will provide the best match to the requirements of the RFP and the needs of the Fund, which may not be the proposal offering the lowest fees. The MWRDRF may take into consideration any factor it deems relevant, including but not limited to, experience, financial stability, the ability to perform the requirements as set forth in this RFP, or previous failure to perform similar contracts in accordance with the terms, or in a timely manner, and other relevant criteria. The MWRDRF is not required to accept for consideration any proposal that fails to address or does not comply with each of the requirements or the criteria set forth in this RFP.
- G. The MWRDRF reserves the right to award a contract based on initial offers received, without discussions or requests for best and final offers. Conversely, the MWRDRF reserves the right to request best and final offers.
- H. Any contract award is ultimately a decision of the Board of Trustees and is not required to be based on the evaluations, scoring, or recommendations by the Fund staff.
- I. The MWRDRF reserves the right to request additional documentation or information from Respondents. Requested information may vary by Respondent. The MWRDRF may ask questions of any Respondent to seek clarification of a proposal to ensure the Respondent understands the scope of the work or other terms of the RFP.

XVIII. CONTRACT NEGOTIATIONS

Once the Respondent(s) has been selected to perform the services, the parties will begin negotiating the terms of the engagement. The MWRDRF does not anticipate or desire a lengthy negotiation. The MWRDRF may, in its sole discretion, terminate negotiations and proceed to engage another party for such services.

XIX. NOTICE REGARDING ILLINOIS PUBLIC RECORDS LAWS

The proposal that you submit will be subject to the Illinois Freedom of Information Act (5 ILCS 140/) "FOIA"). FOIA provides generally that all records in the custody or possession of a public body are presumed to be open to inspection or copying. Section 7(1)(g) of FOIA exempts from production "trade secrets and commercial or financial information obtained where the trade secrets or commercial or financial information are furnished under a claim that they are proprietary, privileged, or confidential, and that disclosure of the trade secrets or commercial or financial information would cause competitive harm to the person or business, and only insofar as the claim directly applies to the records requested." To the extent that you represent to the MWRDRF that the Section 7(1)(g) exemption applies, you must mark each page of your RFP response accordingly and provide a separate version of the response that redacts only those pages, or portions of pages, that include such information. The MWRDRF will determine, in its sole discretion, whether the materials are subject to public disclosure, if a request is made in accordance with FOIA for materials submitted in response to this RFP. If the MWRDRF denies a public records request based on a Respondent's representation that such information is exempt from production, Respondent, by submission of a response to this RFP, agrees to reimburse the MWRDRF for, and to indemnify, defend, and hold harmless the MWRDRF, its officers, Trustees, fiduciaries, employees, and agents from and against any

and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs, and expenses including, without limitation, attorneys' fees, expenses and court costs of any nature whatsoever (collectively, "Claims") arising from or relating to the MWRDRF's complete or partial FOIA denial based on Respondent's assertions.

XX. MOST FAVORED TERMS

All prices, terms, warranties, and benefits offered by the Respondent in its proposal must be comparable or better than those offered by the Respondent in agreements with substantially similar employee benefits fund, governmental, or non-profit clients. Should the Respondent make available more favorable terms to a substantially similar governmental or employee benefits fund client with respect to the types of services set forth in Respondent's proposal, Respondent will make such prices, terms or conditions available to the MWRDRF.

XXI. AGREEMENT AND APPROVAL

The Fund may select one or more firms to provide the services described herein.

To the extent one or more firms are selected, the MWRDRF will work to negotiate an agreement with the selected firm(s), giving due consideration to the stipulations in the Firm's(s') submitted standard agreement.

The selected firm(s) shall be required to assume full responsibility for all services and activities offered in its/their proposal whether provided directly. Further, the MWRDRF will consider the selected firm(s) to be the sole point of contact regarding contractual matters, including payment of fees.

The selected firm(s) and its/their personnel, including subcontractors, shall treat all information provided by the MWRDRF as confidential and is/are prohibited from using that information for any other purposes than those provided by contract, without the MWRDRF's express written consent.

The selected firm(s) shall not use a subcontractor without the MWRDRF's express written consent. All terms and conditions of a contract with the selected firm(s) shall be equally binding on any subcontractors.

The selected firm(s) shall meet specific performance standards established during the contract negotiation process. The approved project schedule, specifying agreed upon, significant milestone events, and a project completion date, shall be incorporated into the contract as projects are identified and assigned to the successful Respondent(s) by the MWRDRF.

APPENDIX
REQUEST FOR PROPOSAL WEBSITE DEVELOPMENT AND SERVICES
DIVERSITY TABLE

Titles	Male	Female	Total	African					Total	
				Caucasian	American	Asian	Hispanic	Disabled		Other
Senior Executives/Management										
Sales / Marketing & Client Services										
Project Managers										
Developers (frontend, backend, other)										
Software Architects										
Other Professionals										
Support Staff, All Others										
Total										

From the above, how many are Veterans? _____