



**REQUEST FOR QUALIFICATIONS
FOR
Pension Administration Software**

Beaver County Retirement Board

**Beaver County Courthouse
810 Third Street
Beaver, PA 15009**

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I. PURPOSE

The Retirement Board of Beaver County, PA is requesting proposals from qualified firms for a new Pension Administration Software System. After all qualified proposals have been reviewed and evaluated, the Retirement Board of Beaver County will select for contract negotiations, the firm they deem to have the experience and qualifications.

II. SUBMISSION OF PROPOSALS

Please send 2 copies of the qualified proposal to Controller Maria Longo at:

Beaver County Courthouse
Attn: Controller's Office
810 Third Street
Beaver, PA 15009

Proposals must be received by 4:30 pm on Friday April 15th, 2021 in the Controller's Office. All proposals should be submitted in a sealed envelope, clearly marked "RFQ – Pension Administration Software".

Proposals must be submitted in hard copy either in person or via the mail. Regardless of the delivery method, Beaver County assumes no responsibility for not receiving proposals and all parties should verify that their proposal has been received prior to the proposal submission deadline. Mailed proposals will be treated in every respect as though filed in person and will be subject to the same requirements. Proposals received after the proposal submission deadline will not be accepted.

All proposals shall be deemed proprietary and kept confidential until the time of contract award at which time all proposals become public and available for public examination. All proposals become the property of Beaver County at the time of submission.

Preparation of proposals by any prospective proposer shall be made at the prospective proposer's expense.

All proposals must be signed by a person authorized to commit the proposing firm to any and all terms and conditions as specified in this RFQ.

The Retirement Board of Beaver County reserve the right to reject any or all proposals in whole or in part, to negotiate costs or seek additional proposals, as they deem appropriate and to award the contract to the firm it deems to have the best interest in Beaver County.

All qualified persons, firms or proposers shall receive consideration without regard to race, color, religious creed, ancestry, national origin, age, handicap status or gender. Beaver County is an equal opportunity employer. The selected firm must ensure that they conduct their business in a similar manner and not discriminate as noted above.

III. REQUIRED CONTENT

Each proposal shall include a concise description of the proposer's ability to satisfy the requirements of this RFQ. The proposals shall be of sufficient detail to describe the following:

A. Introductory Section

- a. The name, job title, address, phone and fax numbers and email address of the primary contact of the firm submitting the proposal.
- b. The name, job title, address, phone and fax numbers and email address for the person in the firm who will be responsible for contract negotiations for this project.

B. Corporate Overview

Please provide a comprehensive corporate overview describing the services provided by your firm. Please highlight any specific data that uniquely qualifies you as it relates to this project. Also include a brief history of the proposer's firm, including the year the company got started, number of employees and location of offices. This should also include if your firm has changed names or has gone by different names and the length of time your firm has been known by each name, if any.

C. Plan Approach and Timeline

Please provide a detailed description of the Implementation Plan and Timeline based on the requirements outlined in the Scope of Work.

D. References

Please provide a list of three (3) client references for projects similar in size and scope of this project that has been successfully completed by your firm.

IV. SCOPE OF WORK

We want the Pension Administration Software to be a single integrated system that administers all pension related aspects for both active and retired members.

A. The proposal should include:

1. Implementation services including initiation, planning, analysis, configuration, testing, training, project management, interface development, etc.
2. Data conversion services including planning, analysis, cleansing, and conversion.
3. Integration with Financial Software (New World/Tyler Technologies) or plan for data conversion between the Software systems
4. Implementation of a secured member portal for member self-service which would at a

minimum permit review of current balances, approximate estimates, account statements, and view contact info including beneficiary information

5. Software maintenance and support.
6. Documentation manual and Training Capability (Manual, videos etc.)
7. Member Correspondence creation and production

B. The proposal should include the ability to convert the following pension data:

1. Active member demographic information
2. Terminated member demographic information
3. Vested and non-vested (deferred) member demographic information
4. Deceased member demographic information
5. Retired member demographic information
6. Active/Vested member beneficiary information
7. Retired member beneficiary information
8. Active/Vested member salary history
9. Active/Vested member service credit
10. Active member retirement contributions
11. Active/Vested member accumulated contributions with interest information
12. Active member buy back information
13. Retired member benefits payments information
14. Member status information

C. The new system must have the ability to handle the following processes:

1. Buy backs of service credit both lump sum and payroll deductions
2. Military buy backs (non-intervening and intervening)
3. Benefit estimate including all optional settlements
4. Termination and withdrawal
5. Refunds/rollover processing including disbursements
6. Ability to track Out time
7. Final calculation and new retiree
8. Rehired retiree and active member
9. Ability to handle COLA modifications to current retirees
10. Qualified domestic relationship order (QDRO)
11. Updating Member demographics
12. Active pension contribution and interest posting
13. Member statements
14. Actuarial Valuation data report
15. Provide an option for customization of reports
16. Electronic Content Management
17. Member/Retiree Self Service
18. Beneficiary Change

19. Able to update changes in taxes, interest applied and class

V. IT FUNCTIONAL REQUIREMENTS

The following are a set of key requirements that the County of Beaver is looking for in a system:

1. Web Server (Database Server, if applicable) has to be a minimum 2016 Server OS, 2019 Server OS preferred
2. System has to be browser agnostic.
3. The proposed application must run on a Microsoft Windows server (minimum 2016 Server OS, 2019 Server OS preferred in a VMware virtual environment). Please list all versions of operating systems the proposed solution is certified to run on.
4. The system should provide an audit trail and track all edits made by all users to the database.
5. Is proposed solution Cloud-based or on-premise system? If it is Cloud-based, please explain if it is fully managed or how it is managed.
6. If Cloud-based, can you ensure the data/application data will remain in the United States at all time.
7. If Cloud-based, what type of cyber security is carried by the vendor making the proposal for this system? Include a copy of insurance declaration page.
8. If provider's insurance is insufficient, will the service provider carry additional insurance to cover the County's loss in the event of a data breach or data loss?
9. Has firm ever had a data breach of any kind? If so, please provide the details. Also, please detail your back up protocols.
10. The proposed solution must be able to run/work with Microsoft SQL server databases.
11. Will solution provider handle the data migration from the existing system to the new one, even if data needs to be converted?
12. What are the desktop requirements (application must run on Windows 10 64-bit OS, prefer mobile browser/mobile application to also be an option)?

VI. EVALUATION CRITERIA

Each submitted proposal will be reviewed and evaluated on the completeness of the information provided. Failure to provide any of the requested information may result in the disqualification of the submitted proposal. During the evaluation process, the Retirement Board of Beaver County reserves the right to request additional information or clarification about the submitted proposals or to allow correction of errors or omissions. At that time, we may request a live presentation of the software to be presented to our Retirement Board Members.