

## APPENDIX A VENDOR RESPONSE SHEET

The project goals and objectives contained in Section 4.4 are provided below. Vendors should respond to each section below with a narrative discussion of how their proposed solution meets (or exceeds) each of the goals. The completed Vendor Response Sheet should be included in Tab IV of the Technical Proposal response.

### **Implement a Fully Integrated Pension Administration Solution (4.4.1.)**

The primary objective of this project is to implement a stable, state-of-the-industry, fully integrated solution capable of supporting WVCPRB's mission well into the 21<sup>st</sup> century (for at least 10 years). It will enable WVCPRB staff to perform their duties associated with financial accounting, calculation of member retirement estimates, employee contribution and benefits, maintaining wage and contribution information, maintaining service credit information, processing requests for information, contribution refunds, contribution paybacks, purchase of service credit, withholding of health insurance premiums, and actual retirement (i.e., including but not limited to researching/reviewing the member's service credits and wage and contribution history, calculating benefits, setting forth retirement options, adding the member to the benefits payment capability), using the workstations (PCs) on each desk tied together through a WVCPRB-wide network via a browser-based system.

#### **Vendor Response:**

### **Provide Operational Process Improvements (4.4.2.)**

Additional objectives to be served by this procurement include:

- Improved service levels to members
- Improved, centralized management of member, retiree and employer information through Customer Relationship Management (CRM) or CRM-like capabilities
- Improved system workflow and greatly increased work efficiency
- Increased and improved Web-based, self-service functions to members, retirees, and employers. See the address below for the current WVCPRB website:

<http://www.wvretirement.com/Index.html>

- Improved accuracy of all information collected, maintained, and provided by WVCPRB
- Improved timeliness and accuracy of responses to members' inquiries
- Improved system audit and control capabilities
- Improved management reporting features
- Inclusion of any proven new technologies that can provide cost-effective benefits to WVCPRB's members
- A secure environment for the receipt and transmittal of information related to members, retirees, and employers.

#### **Vendor Response:**



### **Integration of Operations (4.4.3.)**

In addition to the pension application, WVCPRB greatly desires that the new solution include, but not be limited to, procedures and workflow management elements as well as computer hardware and software components to support WVCPRB's requirements (detailed in subsequent sections of this RFP). This includes all necessary documentation, training materials, and training in procedures and software.

“Standard” workflow management capabilities (examples including, but not limited to, conditional routing, automated work item suspension (and resumption), queue management and ability to modify work packet routing) should be included in the proposed solution. Any workflow queues should be unlimited in size. The system should allow workers to organize how they want to work, i.e., in what order they want information presented to them – including, but not limited to, by date, by priority, and by type of work.

The proposed solution should offer complete integration of information processing, imaging, and other proposed and existing technologies, e.g., internal e-mail and workflow management, as well as all proposed and authorized options.

#### **Vendor Response:**

### **Greater Customer Accessibility and Member Self-Service (4.4.4.)**

Finally, and perhaps most important, WVCPRB requires that the new solution continue to assist the staff in their mission of providing the best possible service to their membership. WVCPRB is committed to increasing its use of technology in providing ever more accessible and member-oriented service to its membership. WVCPRB looks to the new solution to help move from the use of postal mail to far more extensive use of email and other Web-based technologies for WVCPRB's member-based communications. WVCPRB views Web-based, member self-service as a significant goal in the implementation of a new LOB solution.

#### **Vendor Response:**

### **A Solution That Meets WVCPRB'S Goals For At Least The Next Ten Years (4.4.5)**

WVCPRB desires to accomplish these goals with a turnkey solution, including as much standard “off-the-shelf” technology and software as possible, to optimize both efficiencies and effectiveness in its retirement services delivery offerings. The vendor is responsible for ensuring that the solution meets or exceeds all functional and performance requirements set forth in this RFP for 10 years after the end of the warranty period defined herein. If it does not meet the performance specifications, WVCPRB highly desires that the vendor commit to correcting the hardware and software configurations in the time frame specified by the WVCPRB and at no cost to the WVCPRB.

As indicated in Options 1 and 2, WVCPRB may procure, via a separate solicitation, all hardware components (whether new or upgrades to existing hardware) and commodity software products (whether new or upgrades) necessary to support the new solution. The vendor's responsibility in this regard would be to provide WVCPRB with the date by which the various hardware and software must be available for installation and subsequently to perform installation, configuration, burn-in (if any), and test just as is described in this RFP for hardware and commodity software purchased by the vendor. WVCPRB would be responsible for purchasing all hardware and commodity software in accordance with the vendor's recommendations.



Vendors are encouraged to present solutions that embrace enabling technologies: examples include, but are not limited to zero-footprint, browser-based applications, relational database management systems, and workflow management. WVCPRB requires solutions that are based on mature, proven technologies (not those that are old and antiquated, i.e., at or near the end of their life cycle), including but not limited to hardware and software. The solution proposed to WVCPRB should generally reflect the capabilities available to the most technologically enabled state-wide public retirement systems. WVCPRB desires proposals for modern solutions, i.e., open solutions, modern database management capabilities, and user-friendly interfaces. However, WVCPRB does not wish to be a test or “beta” test site for any technologies or solutions.

**Vendor Response:**

