

Pension Administration Project Oversight and Consultation Services RFP

Questions & Answers

October 2023



Orange County Employees Retirement System (OCERS)

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Question	Response
1. Would it be acceptable for any of the services described in Exhibit A – Scope of Services to be performed remotely? If so, can those services be identified?	We are open to a hybrid work schedule arrangement and believe the majority of work in Exhibit A can be performed remotely with specific items requiring the consultant to be on-site.
2. Does OCERS anticipate staffing a dedicated project manager for the procurement and implementation efforts?	The purpose of the RFP is to get an external dedicated project manager for procurement and implementation efforts to work closely with the OCERS Enterprise Project Management Office (EPMO).
3. Several tasks seem better suited for a County Project Manager or System Integrator to conduct. Would OCERS please clarify expected responsibilities for the PAS vendor, OCERS and the oversight vendor?	The PAS vendor will be responsible for configuration and implementation of the actual solution. OCERS will providing data and access to the PAS vendor. The oversight vendor will provide services listed in Exhibit A.
4. If the RFP we are responding to is to help draft a PAS RFP and to provide project oversight, how will the selection of the implementation consultant occur simultaneously? Please clarify	The implementation consultant will be selected prior to the development and release of the PAS RFP. They will be sequential in nature.
5. Is the expectation that we would begin the Assessment and RFP creation in February?	No, see answer to question 4.
6. If we start in February of 2024, what is your expectation of when we would release the PAS RFP?	3 rd Quarter of 2024
7. When framing the 3-year implementation process, are you targeting 3 years once the PAS vendor is selected or 3-years total starting with the creation of the RFP?	We are targeting 3 years once the PAS vendor is selected with optional extension as needed to finish implementation of new PAS.
8. On the Exhibit A, Scope of Work, is the expectation that the consultant will do 100% of the work onsite or is OCERS open to a hybrid solution?	See answer to question 1.
9. What is your current in-office work policy, meaning do you allow staff to work from home and if so what type of schedule do you require?	Our current in-office work policy is remote work on 2 days out of the week with 3 days in-person. We are open to the consultant selecting which days are remote based on the requirements and workload.
10. In Section 1: Introduction it states: “It's worth noting that the selection of the new PAS will	See answer to question 4.

be made independently of, but simultaneously with, the selection of the implementation consultant.”. Can OCERS clarify this statement as the Scope of Services for the PAS consultant include services that are pre-requisites to selecting the new PAS?

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| <p>11. Mid way through the services in Exhibit A Scope of Services, page 11, there is the following statement, “The services described must be provided on-site.” Can OCERS clarify if this applies to the entire scope of services, or just the services prior or after that statement?</p> | <p>See answer to question 1.</p> |
| <p>12. Can OCERS clarify where we should look for the correct Scope of Services? There are currently four (4) referenced Scope of Services in the OCERS Pension Administration Project Oversight and Consultation Services RFP.</p> <p>The first is referenced in Section 3: Scope of Services, which then refers to the second referenced as Exhibit “B” (“Scope of Services”). There is no Exhibit “B” (“Scope of Services”).</p> <p>The third reference is in Exhibit A Scope of Services, page 11.</p> <p>The fourth reference is in Exhibit A Scope of Services, page A-1, which is part of Exhibit D – Services Agreement Template, starting on page 16.</p> <p>The third and fourth references contain the same scope language.</p> | <p>The correct Scope of Services is listed in Exhibit A, page 11 of the RFP. The Exhibit B that is mentioned in Section 3 is a typographical error.</p> |
| <p>13. In third and fourth references for Scope of Services can OCERS provide more clarification around what they are looking for regarding the scope around an “IT strategic roadmap” in “1. Planning – Coordinating tasks associated with requirements definition, IT strategic roadmap, and solutions design.” as well as the reference to “IT Strategic Roadmap in “6. Project Deliverables, “Create an IT Strategic Roadmap plan”?</p> | <p>The IT Strategic Roadmap encompasses the overall new PAS solution, which may include other third-party solutions besides the PAS. Examples of this may include CRM solutions, Call Centers, Workflow, Document Management, etc. The expectation is for the consultant to help offer recommendations and provide guidance as we move forward.</p> |
| <p>14. In third and fourth references for Scope of Services can OCERS provide more clarification around what they are looking for regarding the scope around “solutions design” in “1. Planning – Coordinating tasks associated with</p> | <p>See answer to question 13.</p> |

	requirements definition, IT strategic roadmap, and solutions design.”?	
15.	In Section 7.8 regarding pricing, OCERS states: “OCERS does limit the pricing approach to pricing and will consider alternative pricing methods for the scope of work, or portions of it.” Could OCERS clarify what is meant by this statement?	We welcome all pricing approaches that are offered.
16.	In Exhibit A, under “Selection and Implementation of New PAS,” OCERS lists an activity to “Work with OCERS and PAS vendor to establish procedures for requirements gathering.” Could OCERS provide further details about requirements definition for this initiative. Has OCERS already completed any portion of requirements? Does OCERS’ envision requirements for the PAS being gathered prior to the procurement process or are requirements to be gathered with the vendor?	Requirements are to be gathered prior to the procurement process, which is part of this RFP. We have not completed any portion of requirements currently.
17.	The RFP states that “The services described must be provided on-site.” Our understanding is that OCERS is in a hybrid work environment and, as such, would OCERS consider hybrid and/or remote pricing proposals if the bidder has a proven success with similar project in remote work environments and can significantly reduce project costs?	See answer to question 1.
18.	Per OCERS’ board minutes, OCERS appears to have completed some level of Robotic Process Automation. Can OCERS share any details surrounding that initiative (i.e., software implemented, process automated, integrations with current systems, and how this will be leveraged with the future PAS)?	OCERS is exploring various options of intelligent automation including Robotic Process Automation. Current RPA efforts serve as a proof of concept addressing current needs.
19.	Does OCERS already have a developed strategy and vision with regards to leveraging any other AI, ML and RPA technologies in the new PAS or is OCERS expecting that the IT Strategic Roadmap plan will address these questions?	We are expecting the development of the IT Strategic Roadmap to address these questions. See answers to question 13.
20.	What other systems besides V3 are currently being used to support your pension operations and which do you envision being enhanced or replaced?	The entirety of a new PAS is being envisioned as being replaced. Also see answers to question 13.
21.	Should the pricing proposal include the three optional years?	Yes, please include all relevant pricing broken down by optional years.
22.	Does OCERS already have a high-level roadmap (i.e., schedule or target milestones)	No; see answer to question 13.

	for the requested services in this RFP as well as the future implementation?	
23.	Has OCERS already defined a budget for the overall PAS project? If not, is OCERS expecting that the vendor develops estimated project budgets as part of the IT Strategic Roadmap plan?	We expect the selected consultant to develop the estimated project budgets as part of the IT Strategic Roadmap.
24.	What role will the Enterprise Project Management Office (EPMO) play in the project? Is there a planned governance structure?	The EPMO will serve as the central focal point for progress/status reporting and will interact closely with the selected implementation partner. Currently, there is a project management governance structure in place as well as an enterprise project management tool.
25.	Does OCERS have a preferred implementation approach (i.e., Agile, Waterfall, or Hybrid)?	OCERS is open to different project management approaches; however, selected vendors will be expected to integrate with the OCERS Enterprise Project Management Office (EPMO).
26.	Does OCERS have a pre-existing vision or preference regarding replacement (e.g., with another COTS solution) or enhancement of the existing PAS? If so, would OCERS be able to share?	See answer to question 13.
27.	The RFP indicates the bidder must provide oversight services related to data conversion, system testing, and user acceptance testing. Will OCERS be using other third-party vendors to support the execution of these services or perform the execution services themselves? If third-party vendors will be used, can you please state which services and whether they have already been procured, or whether the bidder shall assist OCERS in their procurement?	No services have been procured. The expectation is that additional services may be needed depending on the solution(s).