



San Mateo County Employee's Retirement Association

Request for Proposal: Pension Administration Software System

TECHNOLOGY MODERNIZATION PROJECT

PROPOSAL DATE: March 12, 2026

RESPONSE DUE DATE: April 23, 2026



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Request for Proposal

1. Introduction

This Request for Proposal (RFP) is issued by San Mateo County Employees' Retirement Association (SamCERA), a multiple-employer public employee retirement system, enacted and administered in accordance with the provisions of the County Employees Retirement Law (CERL) of 1937 (California Government Code Section 31450, et seq.) (1937 Act). Since its creation by the San Mateo County Board of Supervisors in 1944, SamCERA has provided retirement, disability, and survivors' benefits to eligible participants in accordance with the provisions of the CERL, the Public Employees' Pension Reform Act (PEPRA) of 2013, and the Internal Revenue Code.

Currently, SamCERA's 23 employees manage assets and administer benefits for employees of three plan sponsors, including:

- County of San Mateo (County)
- San Mateo County Superior Court
- San Mateo County Mosquito and Vector Control District.

SamCERA has approximately 8,800 active and deferred members, 6,250 retirees and beneficiaries, and net assets of \$7.2 billion as of June 30, 2025. Roughly 95% of SamCERA's active members are employed by the County.

SamCERA is a tax-qualified governmental defined benefit retirement plan. Eligible employees automatically become members of SamCERA as a condition of employment and are placed in one of two membership categories, Safety or General. Safety members include law enforcement positions with the Office of the Sheriff, inspectors with the District Attorney's Office, and probation officers with the Probation Department. All other members are General members.

SamCERA administers up to 12 different pension plans, and a member's pension plan(s) is determined by multiple factors including employer, hire date, membership category (General or Safety), reciprocal service with other retirement systems, and optional plan elections that may have been available to the member. Pension benefits are determined by formulas that vary according to the member's pension plan and pension type (e.g., service retirement, disability retirement, or survivor benefits). Service retirement pension benefits are calculated by applying the member's final average compensation, age, and years of service credit to the appropriate formula for the membership type, plan, and pension type. Plan benefits are funded by employer contributions, employee contributions, and investment earnings.



Basic retirement income is the member's normal monthly lifetime benefit. This basic amount may be adjusted if the member wants to provide monthly income for a surviving spouse, domestic partner, or another person with an insurable interest upon the member's death. The standard formula for calculating basic retirement income is:

$$\text{Service Credit} \times \text{Age Factor} \times \text{Final Average Compensation}$$

SamCERA members have a five (5) year vesting requirement in most plans (ten years for Plan 3). SamCERA has reciprocal agreements with more than 20 other California retirement systems to ensure continuity of benefits for members who change employers and transfer between the retirement systems, under certain circumstances. If a SamCERA member qualifies for reciprocity with a reciprocal system, service credit accrued under both systems can be used to determine vesting under each retirement system. Salary from employment covered under either system can also be used in the benefit calculation.

To administer these benefits and service its membership, SamCERA requires modern and integrated technologies that enhance business processes and efficiencies for SamCERA's staff and stakeholders. SamCERA is currently using a Pension Administration Software System (PASS), implemented in 2017, that will soon cease to be supported by the software vendor. Additionally, the technical limitations of the current PASS require SamCERA staff to rely on manual steps and processes to conduct portions of core business functions.

Therefore, SamCERA has undertaken a technology modernization project aimed at improving operational efficiency and the organization's ability to service its membership. A key component of this modernization is the procurement and implementation of a new PASS capable of standardizing and automating a wide range of SamCERA operations including pension administration, financial reporting, contribution collections, payment disbursements, customer service, data exchange with employers, internal management controls, and operational controls. Through this modernization project, SamCERA seeks to streamline business processes, streamline delivery of services to members and employers, implement best practices in the pension industry, and improve organizational adaptability.

2. Purpose

The purpose of this RFP is to solicit proposals from qualified firms, hereafter referred to as "Bidder," to select and implement a commercially available PASS that will transform SamCERA's business operations from its current environment to one where key business processes are centralized, more automated, and streamlined for maximum efficiency, while remaining auditable and compliant to governing statutes and policies. SamCERA seeks a Bidder to provide the software, implementation services, and post-implementation support related to the PASS. The successful Bidder must



demonstrate long-term viability, commitment to its product and the public retirement industry, product adaptability and enhancement plans, and must have a client base to provide and sustain a long-term solution for SamCERA. Bidder is required to provide requested company information in **Attachment 1 – Company Information**, as part of their response to this RFP.

SamCERA seeks to enter a long-term business relationship with a PASS Bidder that:

- Has a history of successful implementation of comparable projects with agencies of similar size and complexity as SamCERA.
- Has a long-term commitment to the pension administration system business and has long-term viability as a company.
- Has a robust product enhancement strategy for both software functionality and architecture that will keep it current with industry trends, standards, compliance, and regulations without the need for customization by SamCERA.
- Can provide an efficient and proven set of implementation services to ensure SamCERA has a structured, timely, and complete deployment of the new PASS.
- Can provide a product and support that allows SamCERA to leverage the capabilities of the software to add efficiency to business processes and achieve its business goals.
- Offers a hosting option with the staffing and facilities to support SamCERA security, performance, availability, reliability, disaster recovery, business continuity, and operational requirements.
- Provides high quality, responsive software maintenance and support services for the installed system.

This RFP can be found on the SamCERA website at www.samcera.gov/about-samcera/requests-for-proposals. If potential Bidders are unable to download this document from the website, they can also obtain an electronic copy of this RFP by emailing a request to proposals@samcera.gov. All responses to this RFP must be submitted in accordance with the instructions contained in this RFP.

Regardless of the way the Bidder receives this RFP document, the contents of the RFP may not be altered in any way. The attachments and all questions must be identically reproduced in the submitted proposal. Any alterations to the contents of the RFP document will be grounds for dismissal from consideration or termination of a resulting contract. By submitting a proposal, it is agreed by the Bidder that any misleading or false information given may be grounds for dismissal from consideration, or termination of any resulting contract, whenever and however discovered.



Each proposal must anticipate that the Bidder will provide the solution outlined in this RFP without exception unless said exception is specifically identified in the proposal (see Section 15, Clarifications and Exceptions, for further instructions). Any deviations from the specifications may disqualify the proposal from consideration as not responsive.

The Cost Proposal Form included in this RFP shall be used for all cost information; other formats will not be accepted. See Section 17.1, Solution Cost, for cost proposal instructions. Footnotes to the form may be used to provide supplemental explanations, if necessary, and any clarifications noted as described in Section 15, Clarifications and Exceptions.

3. Minimum Qualifications and Intent to Bid

The following minimum qualifications must be met for proposals to be eligible for evaluation:

- Bidder must maintain operations in the continental United States and certify that all SamCERA data maintained or used during implementation or operations will not leave the continental United States.
- The bidder must have at least seven (7) years of experience with the design, installation, and maintenance of PASS solutions. The solution must represent an integrated PASS, except for the ECM (Imaging) and CRM (Customer Relationship Management) modules, which may be third-party solutions; however, all components must be integrated with core, line-of-business functionality.
- The bidder must have three references for implementations of the equivalent pension administration software solution being proposed to SamCERA. “Equivalent solution” is defined as either the same version of the application or one major version earlier and for funds with a Defined Benefit (DB) plan and a total membership size of at least 15,000 members. These references must be for implementations that are no older than five years, at least one (1) of these references must be from a United States pension client, and one (1) must be from a completed implementation.

Interested bidders must complete and submit **Attachment 2 – Minimum Qualifications and Intent to Bid** form as an attachment to an email sent to proposals@samcera.gov, thus confirming their intent and minimum qualification to bid on this project. Please include the following:

- Email subject line: [Bidder Name] Intent to Bid on RFP
- Email body: Please submit any identifying information indicating that the message is to confirm interest in submitting a proposal. Minimally, bidders are to include the following information:



- Contact name
 - Contact phone
 - Contact email
 - Bidder name
 - Product to be proposed
 - Location of Office
 - Location of Support Office
- Email attachment: Completed RFP Attachment 2 - Minimum Qualifications and Intent to Bid form

The Bidder may also include initial questions regarding the RFP in the initial email. The Bidder may use and submit optional RFP **Attachment 3 – Bidder Questions Form** as an attachment to the email for this purpose. These questions and their answers will be distributed to all qualified Bidders.

4. Procurement Timeline

The following table presents the schedule for the selection of SamCERA’s PASS vendor. SamCERA will make its best efforts to stay on schedule but reserves the right to adjust the timeline.

Activity	Time	Date(s)
Request for Proposals (RFP) issued	6:00 p.m. PDT	March 12, 2026
First round written questions from Bidders due	4:00 p.m. PDT	March 19, 2026
Response to written questions posted	5:00 p.m. PDT	March 24, 2026
Notice of Minimum Qualifications and Intent to Bid due	4:00 p.m. PDT	March 26, 2026
Second round written questions from Bidders due	4:00 p.m. PDT	April 2, 2026
Response to written questions posted	5:00 p.m. PDT	April 9, 2026
Proposals due	4:00 p.m. PDT	April 23, 2026
Finalists selected	5:00 p.m. PDT	May 21, 2026



Activity	Time	Date(s)
Finalists’ oral presentations and demonstrations	TBD	June 11, 2026
Best and final offer process	4:00 p.m. PDT	June 18, 2026
Bidder Selected / Contract Negotiations	N/A	June 19, 2026 - July 21, 2026
SamCERA Board of Retirement Approval	10:00 a.m. PDT	July 28, 2026

4.1. Request for Proposal (RFP) Issued

This is the date the RFP will be available to potential Bidders through the SamCERA Website (www.samcera.gov).

4.2. Notice of Minimum Qualifications and Intent to Bid

The Minimum Qualifications and Intent to Bid form, as described in Section 3.0, is due from potential Bidders on this date.

4.3. Written Questions

All questions must be submitted to SamCERA no later than the due dates and times listed above. Two rounds of questions will be included. The first round of questions should be limited to minimum qualifications and preliminary questions to determine intent to bid. The second round of questions will be the appropriate round for any additional inquiries regarding the RFP.

All questions must identify the RFP section and page number to which the question refers and must be sent by email, as an attachment, to proposals@samcera.gov. Questions must be in a word processing format that can easily be copied and pasted into other documents to facilitate sharing of answers (e.g., MS Word). SamCERA has provided **Attachment 3 – Bidder Questions Form** as an optional format for question submission.

All questions and responses to questions will be posted on the SamCERA website by the appropriate response date and e-mailed to all Bidders who have returned the Minimum Qualifications and Intent to Bid form. The names of the Bidders who submitted questions will not be revealed.



All potential Bidders should submit any questions that could assist in clarifying aspects of the RFP. Failure to request clarification of any inadequacy, omission, or conflict will not relieve the Bidder of any responsibilities under this solicitation or any subsequent contract. It is the responsibility of the interested Bidder to ensure that they receive responses to questions, if any are issued.

4.4. Proposals Due

To be considered, a complete RFP response must be received by SamCERA by the due date and time.

4.5. Finalists Selected

The SamCERA selection committee will review the RFP responses and select finalists during this period. SamCERA will perform due diligence on the responding Bidders, including reference checks and potential site visits, during this period.

Should SamCERA have questions concerning any Bidder's responses during this evaluation period, SamCERA may contact the Bidder in writing to request clarification. Questions may also be posed to Bidders during the oral presentations.

4.6. Finalists' Oral Interview and Software Demonstration

The finalist Bidders will be invited to provide an oral presentation and software demonstration to SamCERA. SamCERA expects that the presentations will be held at the SamCERA office in Redwood City, CA. Bidders are required to have their key, named resources participate in the presentations and should be prepared to provide a software demonstration. More details about the presentations and demonstration requirements will be provided to the finalist Bidders once finalists are selected.

4.7. Best and Final Offers

SamCERA may request that finalist Bidders provide a Best and Final Offer for their proposed product and services, particularly if there is not a clear winner among the finalists. The Best and Final Offer will allow Bidders to refine their offers based on information they have gathered during the procurement process and put forth the most favorable terms for SamCERA's consideration.

4.8. Successful Bidder Selected / Contract Negotiations Begin

SamCERA staff will enter contract negotiations with the Bidder whose proposal best addresses SamCERA's requirements. Such negotiations must conclude and an agreement must be finalized by July 21, 2026, in order to obtain approval of the agreement at the Board of Retirement's July 28, 2026, Regular Meeting. Should such negotiations be unsuccessful or otherwise delayed, SamCERA, in its sole discretion, may initiate discussions with any other Bidder(s) whose proposal(s) satisfy SamCERA's requirements.

4.9. Contract Approval

The agreement will be brought to the Board of Retirement for approval at its July 28, 2026, Regular Meeting.

5. Key Background Information

5.1. Business Operations

SamCERA's business operations are typical of a California County retirement system established under the CERL. SamCERA administers retirement, disability, death, and survivor benefits for active and retired members of three plan sponsors. The bulk of business operations are member-facing and aimed at servicing the needs of the membership. The following is a list of SamCERA's primary member-related business processes.

1. Member Enrollment (Hires and Rehires)
2. Employer Contribution
3. Interest Posting
4. Reciprocity
5. DROs
6. Service Retirements
7. Disability Retirements
8. Refunds (including all one-time payments)
9. Service Credit Purchase
10. Benefit Estimates
11. Benefit/Refund Disbursements
12. COLA Processing
13. 1099R Issuance, Tax Withholding, and Tax Reporting
14. Death Processing

SamCERA communicates with members through a variety of physical and digital channels, including in-person visits. Although SamCERA has invested in portals and automation, staff continue to play a central role in counseling members, processing member requests, and ensuring the accuracy of member data. The legacy V3 PASS provides for the general needs of SamCERA's operations, but it lacks the ability to provide many modern automations, and SamCERA therefore relies heavily on staff oversight to ensure accuracy, consistent with the operational model of many 1937 Act retirement systems.

SamCERA's staff are also responsible for many non-member-facing operations that are also typical for a retirement system. These include accounting, financial reporting, processing payments for benefit recipients, vendors, and tax authorities, managing investments, and executive administration for the organization.

5.2. Current Technology Environment

SamCERA operates in a hybrid IT environment combining county-managed enterprise systems with applications hosted by Amazon Web Services (AWS) that are specific to SamCERA's operations. Core infrastructure is currently built on a fully virtualized VMware environment. Its server landscape includes Windows Server 2016 and Red Hat Linux. The County manages Microsoft 365, network infrastructure, and Palo Alto Cortex XDR endpoint protection. SamCERA's IT team oversees local servers, AWS environments, and application-specific needs. Staff primarily use Windows 11 laptops with limited macOS devices for specialized roles.

SamCERA's main line-of-business application is Vitech's V3 Pension Administration Software System, version 10.6.9, operating on a Java/Oracle platform and hosted by AWS. SamCERA's IT staff manage six development/test instances refreshed from production, oversee SQL-based Extract, Transform, Load (ETL) processes for reporting, and handle numerous manual reports for Human Resources (HR), auditors, and communications. Daily and bi-weekly File Transfer Protocol (FTP) jobs integrate demographic and contribution files sourced from the County's Workday system, to which SamCERA staff also have limited access to update certain member data points. San Mateo County Superior Court and San Mateo County Mosquito and Vector Control District submit similar information, extracted from an Automatic Data Processing (ADP) payroll system, to SamCERA through Vitech's native employer self-service web portal. SamCERA uses Kofax scanning to move paper member documentation into V3's imaging solution, to which members can also upload documents through the member web portal. SamCERA uses PensionX (a subsidiary of Digital Deployment) for its member self-service portal, which includes a mobile app, and allows members real-time integration with their data in V3.

SamCERA's current support contract with Vitech is set to end in 2027, and Vitech's support of the V3 product will be sunset in December 2028. Therefore, these changes are primary drivers for SamCERA's technology modernization project and its timeline.

Finance uses a standalone accounting application, cloud-hosted Microsoft Dynamics Great Plains, to account for SamCERA's financial activities. No automation will be required between the new PASS and SamCERA's accounting system. However, the PASS must store, validate, and report on all member and employer contribution transactions including amounts receivable and payable by mapping transactions in the PASS to SamCERA's Chart of Accounts.

5.3. Member Data Sources

The primary member data source is the legacy V3 PASS database. This data includes all member demographic information including employment, contribution, service, retirement, and benefit payment data. Imaged member documents are stored in the V3 imaging solution. Member data sources external to the legacy PASS have not been identified.

6. Services to be Provided

SamCERA requires that the implementation delivers the following:

- A stable, robust, and mature software solution, managed as a hosted solution
- Thoroughly trained SamCERA staff
- Thorough user guides / procedure manuals
- Thoroughly prepared SamCERA IT support team
- Quality system documentation and support materials
- Loading data from staging database to the new PASS database

6.1. Project Scope

SamCERA envisions a modern, integrated technology ecosystem in which people and systems work together seamlessly to serve members, employers, and stakeholders. SamCERA is looking for a PASS solution that will meet all pension administration business functions while improving member services and operations and reducing operating costs. SamCERA expects the new solution to provide a unified, one-stop, improved customer experience for members and employers with respect to all programs administered by SamCERA and to provide secure member and employer portals through which customers and employers can conduct business with SamCERA.



The needed solution will streamline processes, reduce redundant steps, optimize use of PASS workflows, and replace the need for side applications (e.g., Microsoft Excel) that are performing functions outside of the existing PASS, wherever possible. It must be designed to be flexible, adaptable to regulatory changes, and supportive of both staff-driven processes and member/employer self-service. The solution must provide SamCERA with flexibility and ease of configuration with minimal dependence on the system vendor. The system must also provide robust security controls and comprehensive audit capabilities to ensure appropriate access, protect sensitive data, and support transparency and accountability in system activities.

SamCERA desires to obtain the solution and associated services in the most cost-efficient manner possible and prefers a solution that has been successfully implemented in similar organizations. SamCERA is willing to take advantage of service delivery models and business processes that have proven effective in other similar organizations.

In support of these objectives, the scope of work for this RFP includes:

- Implementation of a Pension Administration Software System package, including core pension administration functionality, payment processing, and reporting functionality that will replace existing critical functionality and automate current manual processes.
- Implementation of Workflow and Case Management functionality, preferably as a native component of the PASS, but alternatively as a tightly integrated third-party application(s). If a third-party application is proposed, Bidder must identify a partner to provide this functionality and will be responsible for all integration and maintenance.
- Implementation of a Member Self-Service Portal and, if available, a mobile app for members, to support all aspects of business conducted between members and SamCERA. SamCERA encourages Bidders to propose the cost of their Member Portal and mobile app implementation separately, as an optional component, so that SamCERA may optionally elect to implement the Bidder's solution or retain an alternate solution.
- Implementation of an Employer Self-Service Portal for employer contributions reporting, secure communications with SamCERA, and document exchange, preferably as a native component of the PASS, but alternatively as a tightly integrated third-party application. If a third-party application is proposed, Bidder must identify a partner to provide this functionality and will be responsible for all integration and maintenance.
- Implementation of Electronic Content Management (ECM) solution for document imaging, preferably as a component of the PASS, but alternatively as a tightly integrated third-party application. If a third-party application is proposed, Bidder must identify a partner to provide this functionality and will be responsible for all integration and maintenance.

- Implementation of Customer Relationship Management (CRM) functionality, preferably as a component of the PASS, but alternatively as a tightly integrated third-party application. If a third-party application is proposed, Bidder must identify a partner to provide this functionality and will be responsible for all integration and maintenance.
- A full scope of implementation services for all proposed components, including initiation, planning, analysis, configuration, testing, training, project management, interface development, data conversion (including image conversion) (in concert with SamCERA's data conversion vendor), etc.
- Assist SamCERA in the development or adaptation of business processes to leverage the new functional capabilities of the PASS and align with industry best practices.
- Establishment and maintenance of the required hardware and software for the solution as proposed.
- Software maintenance and support during and after implementation.

6.2. PASS Functional Areas

The proposed PASS must enable SamCERA staff to perform all existing duties associated with their pension administration operations, including, but not limited to:

- Administration of SamCERA's Retirement Benefits
- Administration of Death Benefits
- Administration of Disability Benefits
- Administration of Benefit Payroll
- Administrative and Security Controls
- Applying Interest to Member Accounts
- Calculating Retirement Options
- Customer Relationship Management
- Document Management
- Exporting of Member Data to Internal and External Stakeholders
- Generation and Management of Correspondence
- Generation of Actuarial Valuation and Experience Extracts
- Generation of Auditor Data Extracts
- Generation of Annual Member Statement
- Granting Cost-of-Living Adjustment (COLA) and COLA Banking
- Importing Employer Payroll Transmittal Files

- New Member Enrollment
- Extracts of Financial Data for General Ledger
- Processing 1099Rs; Reporting of State and Federal Taxes
- Processing Reciprocal Agency Agreements
- Processing Member Contribution Adjustments
- Processing Domestic Relations Orders (DROs)
- Processing Service Credit Purchases and Repayments of Contribution Refunds
- Processing Terminations, including Deferred Retirements and Refunds
- Self-service Web Portals (Member and Employer)
- Benefit Estimates
- Setup of Retirement Benefits
- Tracking Member Interactions and Counseling
- Death Searches and Alive and Well Campaigns
- Tracking Member Contributions and Interest
- Tracking Employer Contributions
- Tracking COLA Increases
- Calculating Pension (Employer) and Annuity (Member) by Plan
- Tracking “Contribution and Interest” declining balance
- Updating Factor and Tax Withholding Tables
- Generating User-Defined Reports
- Generating Monthly Benefit Statements
- Tracking Irregular Activities or Exceptions

6.3. Deliverables

Many deliverables will be required throughout the implementation. A complete list will be jointly developed by SamCERA and the winning Bidder during the contract negotiation period. Expected deliverables include, but are not limited to:

- Implementation Plan and Schedule
- Project Communication Plan
- Change Control Plan
- Test Strategy and plans
- Regular status reports
- Design documents
- Release Management Plan
- Security Plan

- Risk Assessment Plan
- Disaster Recovery Plan
- Post-Implementation Plan

The Bidder will deliver all project documentation to SamCERA in a standardized format for professional documents. Documents must be properly formatted, versioned, named, and organized. SamCERA will not dictate the format or frequency of project documentation, but the Bidder shall ensure the following standards are met:

- All business requirements must be documented and appropriately tracked
- The technical design of the system must be completely documented
- All software releases must be documented (i.e., release notes)
- All customized functionality, enhancements, or modifications must be documented
- The Bidder must submit written project status reports on a regular basis

The Bidder must provide draft release notes with confirmed content of each build prior to delivery for testing, with final release notes accompanying the delivery. SamCERA will use this information to plan their testing activities prior to receiving delivery of functionality.

SamCERA must have a minimum of five (5) full SamCERA business days (SamCERA is open Monday through Thursday) to review all documentation that requires a sign-off. SamCERA will be granted extensions if the Bidder submits documents that are particularly lengthy.

6.4. Data Conversion

Data conversion will include both the legacy member databases and document images conversion. SamCERA has engaged a third-party data conversion vendor to manage and execute data conversion activities from legacy data extraction to the delivery of the final data to the Bidder for migration into the new PASS. The Bidder will be responsible for working collaboratively with this vendor to ensure the conversion activities are synchronized with the software development, testing, delivery, and deployment tasks. SamCERA considers the collaboration of the vendors to be of utmost importance to the success of the project. Bidders must complete **Attachment 4 – Data Conversion Questionnaire** as part of the RFP response.

6.5. Hosting

SamCERA anticipates proposals for solutions in which the Bidder or a third-party provider contracting with the Bidder will host all PASS and ECM environments at the Bidder's or third-party location. An on-premises SamCERA-hosted or County hosted solution will not be considered.



System(s) hosted by the Bidder or third-party provider would be accessed securely by SamCERA business and technical staff. Bidder must address the technical and hosting requirements of this RFP. Bidder must also include a separate disaster recovery site in the proposal. The Bidder will be responsible for the performance of the solution: if there are performance issues, the Bidder will be expected to analyze both SamCERA's environment and the Bidder's system to determine the source of issues.

Bidders will include detailed information on hosting and support of the application in their response to this RFP, including the following:

- The hosting environment where the system is located will meet the current standards for security and performance (the Bidder must provide the standards that are met, in addition to detail how those standards are assessed and maintained).
- The Bidder will describe service options such as infrastructure as a service (IaaS), platform as a service (PaaS), and software as a service (SaaS) that will be needed; additionally, managed services that include application services, system services, and database administration services will be included.
- The Bidder will host the ECM system, Member Portal, Employer Portal, and the PASS.
- The Bidder will host the system throughout the implementation of the PASS application and in production.
- The Bidder will determine the bandwidth requirements for the connection to the hosted PASS based on the response times and user capacities defined in the requirements.
- The Bidder will secure the connection to the hosted application based on the encryption standards specified in the cybersecurity requirements.
- The Bidder will adhere to the service level agreements for system performance and technical support as defined in the technical requirements.
- The Bidder will provide the results of independent third-party penetration and security testing and agrees to perform this testing annually, at no cost to SamCERA.
- The Bidder will include provisions in the proposal for providing SamCERA access to their raw data via a copy of the production database, supplied at mutually agreed-upon intervals or as-needed.

The bidder may propose utilizing a major commercial cloud provider, such as AWS, Google (Google Cloud), or Microsoft (Azure), as a hosting provider.

7. Terms and Conditions

The RFP response from the successful Bidder may be incorporated by reference into the final contract, which will be negotiated between SamCERA and the successful Bidder, and finalized for approval by the SamCERA Board of Retirement.

Bidders are responsible for reviewing all terms and conditions in this Section 7, Terms and Conditions and in SamCERA's sample contract provided in **Attachment 18 – Sample Contract**.

By submitting a proposal, the Bidders acknowledge and agree that such submission is an acceptance of the Sample Contract and the terms and conditions that are noted in this RFP. Bidders are to price and submit proposals to reflect all the specifications, requirements, and terms and conditions substantially the same as those included in this RFP. Failure to do so will result in such RFP proposal being deemed non-responsive.

Any specific areas of dispute with the terms and conditions below must be identified in the Bidder's response and may, at the sole discretion of SamCERA, be grounds for disqualification from further consideration in award of a contract. SamCERA requests that Bidders provide feedback on the attached Sample Contract to highlight any potential concerns. SamCERA may consider and may choose to accept some, none, or all contract modifications that the Bidder has submitted with the Bidder's proposal.

Nothing herein prohibits SamCERA, at its sole option, from introducing or modifying contract terms and conditions and negotiating with Bidders to align the proposal to SamCERA's needs. SamCERA has significant and critical time frames for this initiative. Therefore, should such negotiations with the highest ranked, apparent successful Bidder fail to reach agreement in a timely manner as deemed by SamCERA, SamCERA, at its sole discretion, retains the option to terminate negotiations and continue to the next-highest ranked proposal.

As noted in Section 4.9, Contract Approval, the final contract will be presented to the SamCERA Board of Retirement for approval at its July 28, 2026, Regular Board Meeting.

The following are terms and conditions that apply to this RFP:

7.1. Fixed Price

The pricing structure for the contract for the Bidder's solution will be set up as part of a fixed-price agreement.

7.2. Advance Payments

No request for early payment, down payment, or partial payment will be honored except for products or services already received. Milestone payments are not considered partial payments or progress payments; however, as part of the evaluation process, milestones may be rejected or negotiated with SamCERA if they do not appear to represent completion of deliverables. Maintenance subscriptions may be paid in advance provided that, should SamCERA terminate early, the amount paid shall be reimbursed to SamCERA on a prorated basis; all other expenses are payable net 30 days after receipt of a proper invoice and acceptance of satisfactory compliance.

7.3. Prime Contractor

Proposals that include multiple Bidders must clearly identify one Bidder as the prime contractor and all others as subcontractors.

7.4. Most Favorable Terms

The successful Bidder guarantees that SamCERA will receive the most favorable terms for the overall agreement relative to the Successful Bidder's three most recent contracts for systems of a relatively similar size and requirements within the State of California, if any.

7.5. Effective Dates of Offer

SamCERA requests that Bidders state in their cover letter that the Proposal will be valid for up to one (1) year from SamCERA's receipt of the proposals. Should any Bidder object to this condition, Bidder should provide the preferred duration for a valid proposal and the reason for that duration in the cover letter.

7.6. Cost of Preparing Proposal

SamCERA will not be liable for any costs incurred by the Bidder in the preparation and presentation of proposals submitted in response to this RFP including, but not limited to, costs incurred in connection with the Bidder's participation in finalists' oral presentations and demonstrations.

7.7. Readability

Bidders are advised that SamCERA's ability to evaluate proposals is dependent in part on the Bidder's ability and willingness to submit proposals which are well ordered, detailed, comprehensive, and readable. Clarity of language and adequate, accessible documentation are essential. Bidders should maintain the sequence of sections as they are depicted in the RFP.

7.8. Bidder Responsibility

It is the Bidder's responsibility to examine all specifications and conditions thoroughly and to comply fully with specifications and all attached terms and conditions detailed in the RFP. Bidders must comply with all federal, state, and local governmental laws, ordinances, and rules.

7.9. Changes in Proposals

If it becomes necessary to revise any part of this RFP, or if a more exact interpretation of provisions of this RFP is required prior to the due date for proposals, a supplement will be emailed to all Bidders who have timely submitted a Notice of Minimum Qualifications and Intent to Bid. If such addenda issuance is necessary, SamCERA reserves the right to extend the due date of proposals to accommodate such interpretations or additional data requirements.

7.10. Bidder Responsibility to Provide Full Response

It is Bidder's responsibility to provide a full and complete written response which does not require interpretation or clarification by SamCERA. The Bidder is to provide all requested materials, forms, and information. The Bidder is responsible to ensure the materials submitted will properly and accurately reflect the Bidder specifications and offering. During scoring and evaluation (prior to any interviews), SamCERA will rely upon the submitted materials and shall not accept materials from the Bidder after the RFP deadline; however, this does not limit the right of SamCERA to consider additional information (such as references that are not provided by the Bidder but are known to SamCERA, or past experience by SamCERA in assessing responsibility), or to seek clarifications as needed by SamCERA.

7.11. Errors in Proposals

Bidders are responsible for errors and omissions in their proposals. No such error or omission shall diminish the Bidder's obligations to SamCERA.

7.12. Withdrawal of Proposal

The Bidder or an authorized representative may withdraw proposals by written notice received at any time before award. The withdrawal is effective upon receipt of notice by SamCERA. Bidders may submit modifications to proposals at any time before the date and time proposals are due, and may submit modifications in response to an amendment, or to correct a mistake at any time before award.

7.13. Rejection of Proposals, Right to Cancel

SamCERA reserves the right to reject any or all proposals at any time with no penalty. SamCERA also has the right to waive immaterial defects and minor irregularities in any proposal. SamCERA reserves the right to cancel this RFP at any time, for any reason. Issuing this RFP does not obligate SamCERA to enter into a contract with any Bidder.

7.14. Incorporation of RFP and Proposal in Contract

The required terms and conditions of proposals and Bidder's response, including all promises, warranties, commitments, and representations made in the successful proposal, shall be binding on Bidder and may be incorporated by reference in SamCERA's contract with Bidder.

7.15. Non-Endorsement and Publicity

In selecting a Bidder, SamCERA is not endorsing Bidder's products and services or suggesting that they are the best or only solution to SamCERA's needs. The Bidder agrees to make no references to SamCERA or the department making the purchase in any literature, promotional materials, brochures, news releases, sales presentation, or the like, regardless of method of distribution, without prior review and express written consent of SamCERA's Chief Executive Officer (CEO).

7.16. Indemnification During the RFP Process

By submitting a proposal, Bidders acknowledge and agree to fully indemnify, hold harmless and defend SamCERA, its Board, officers, participants, employees, agents and representatives against and in respect of any and all claims, demands, damages, suits, actions, costs, charges, losses, liabilities, expenses, and deficiencies, (including without limitation legal fees and expenses), whether or not involving a third-party claim, resulting from, arising out of, or in any way related to (a) any untrue warranty or representation or material omission of the Bidders contained in their



proposal; (b) any breach of any warranty or representation of the Bidders contained in their proposal; (c) any breach of any covenant or other obligation or duty of Bidders under this RFP or under applicable law; and, (d) any liens, claims, encumbrances, or infringement of any patent, trademark, copyrights, or other proprietary or intellectual property right in each case whether or not caused by the negligence of SamCERA or any other Indemnified Party and whether or not the relevant claim has merit.

7.17. Proprietary Information

All proposals submitted in response to this RFP shall become the exclusive property of SamCERA. SamCERA reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected.

All proposals, protests, and other materials submitted in response to this RFP shall be subject to public disclosure pursuant to the California Public Records Act (Cal. Govt. Code Sections 7920.000 *et. seq.*). Additionally, any contract which may arise from this RFP will be a public record. Bidder acknowledges that SamCERA will not assert any privileges or confidentiality arguments that may exist on behalf of the person or entity submitting a proposal or materials in response to this RFP.

If Bidder submits any information that it believes is protected from disclosure as a trade secret or on any other basis, Bidder shall clearly mark each page of such material that it believes is subject to such protection as “CONFIDENTIAL” prior to submission to SamCERA. If a public records request is thereafter made for any materials that have been clearly marked as “CONFIDENTIAL,” by Bidder, SamCERA will use reasonable efforts to timely inform the Bidder of such request in order to permit Bidder to assert any applicable privileges and to seek a protective order preventing the release of such materials. Bidder agrees that, in the meantime, SamCERA may release any pages of Bidder’s proposal or other materials that have not been expressly marked by Bidder as “CONFIDENTIAL” as set forth above.

Bidder acknowledges and agrees that it is solely responsible for asserting any applicable privileges or reasons why a document it has submitted should not be produced in response to a public records request. Failure by a Bidder to obtain a court order protecting information from disclosure within ten (10) days of SamCERA’s notice to the Bidder will be deemed agreement to disclosure of the information and the Bidder agrees to indemnify and hold SamCERA harmless for release of such information. Requests to treat an entire proposal as confidential will be rejected; nor shall Bidders mark each and every page of their proposal materials as “CONFIDENTIAL.” Such actions shall be deemed agreement to SamCERA’s disclosure of the entire proposal and the Bidder agrees to indemnify and hold SamCERA harmless for release of any information requested.

Subject to the provisions for marking selected portions of materials as “CONFIDENTIAL” as noted above, submission of any materials in response to this RFP constitutes: 1) consent to SamCERA’s release of all such materials under the Public Records Act without notice to the person or entity submitting the materials; 2) waiver of all claims against SamCERA and/or its officers, agents, or employees that SamCERA has violated a Bidder’s right to privacy, disclosed trade secrets, or caused any damage by allowing such proposal or materials, or portions thereof, to be inspected; and 3) agreement to indemnify and hold harmless SamCERA for release of such records under the Public Records Act.

8. Functional Specifications

SamCERA has completed a thorough needs assessment and analysis of the system requirements necessary to support its operations. This work has resulted in the functional specifications and associated business rules found in **Attachment 5 - Functional Requirements Response**. Each major business process at SamCERA is defined by a list of user stories with acceptance criteria. Bidders should understand that while this list of requirements is extensive, it does not contain the full and complete description of SamCERA’s functional specifications. The winning Bidder will work with SamCERA subject matter experts to expand these specifications into fully developed use cases on which the system function and configuration will be based.

Each user story in **Attachment 5** is identified by a number. There is nothing to be implied from the process identification numbers other than simple identification. The individual requirements are numbered as an extension to the process number. Please do not alter the process identification numbers or requirement numbers in your response.

SamCERA requests that Bidder address each requirement in **Attachment 5**, as described on the included Bidder Instructions worksheet. Additionally, Bidder must complete **Attachment 6 - Functional Questionnaire** to provide SamCERA with a complete picture of the functionality available through Bidder’s solution.

9. Video Capture

Bidder must provide SamCERA with a short (10 minutes, maximum) digital video capture that provides SamCERA with insight into the look, feel, and user experience of the Solution from the perspectives of a SamCERA user, a member user on the member portal, and an employer user on the employer portal. In creating the video, Bidders should use the opportunity to showcase the solution and the aspects that make it stand out from competitors.

SamCERA offers the following guidelines for the video capture:



1. Video should be a maximum of 10 minutes in length, with roughly 5 minutes showing the internal PASS user experience and 5 minutes showing the Member and Employer Portals.
2. SamCERA would like to see the system from the perspectives of internal SamCERA users, members, and employers as though they were using the system – not just a series of screen captures.
3. A verbal narrative of what is being shown would be helpful but is not required.

Bidders should use **Attachment 7 – Video Capture** to provide the appropriate link(s) to the video capture content. Videos on Bidder’s private hosting subscription such as Vimeo and YouTube are acceptable.

10. Technical and Cybersecurity Specifications

SamCERA has prepared both Technical Specifications and Cybersecurity Specifications, which can be found in **Attachment 8 – Technical Requirements Response** and **Attachment 9 – Cybersecurity Requirements Response**, respectively. SamCERA requests that Bidder address each requirement in **Attachments 7 and 8**, as described in the included Bidder Instructions worksheet in each of these Attachments. Additionally, Bidder must complete **Attachment 10 – Technical Questionnaire** to provide SamCERA with a complete picture of the technical environment for the Bidder’s proposed solution.

Each Technical requirement in **Attachment 8** and each Cybersecurity requirement in **Attachment 9** is identified by a number. Please do not alter the requirement numbers in your response.

11. Implementation

11.1. Scope, Constraints, Guidelines of the Bidder’s Responsibility

The implementation timeline is expected to be 24 - 36 months from kick-off to go-live. This timeframe is based on SamCERA’s consultant’s experience with implementing a system of this scope, with this level of data cleanup and conversion, and with the potential client staff to be assigned to the project. SamCERA will consider creative solutions for meeting this expected timeline, including a well-planned and operationally practical phased delivery approach.

If a Bidder believes that the duration of this project should be either shorter or longer, the Bidder is welcome to suggest an alternate timeframe but must identify the reasons for the difference in



project duration. Additionally, if Bidder's project duration is shorter or longer, we ask that any price differential from the estimated 24 - 36 months is also summarized, although a detailed, itemized price differential breakdown is not necessary.

Staff at SamCERA will prioritize this project to meet the reasonable needs of the software Bidder. However, there will be no SamCERA staff resources who will be 100% dedicated to this project. SamCERA has engaged a third-party implementation specialist to augment SamCERA resources and provide PASS implementation expertise.

To ensure common vocabulary, Bidder should explicitly define vocabulary used in their project lifecycle, as the usage of words such as release, testing, build, dry run, requirements, and configuration are often unique to a Bidder's practice.

SamCERA will accept only complete and tested deliveries, including all database schema, converted data, applications, documents, release notes, user documents, etc. that are germane to the delivery. Bidder will test deliveries with sanitized, converted SamCERA data prior to delivering to SamCERA. SamCERA is expecting the Bidder to assign a team that has significant experience working with the software Bidder. The team assigned will be required to participate in the oral presentations and demonstrations. The Bidders should only present staff who are available to work on the project for an extended period. SamCERA reserves the right to designate certain members of the Bidder's team as 'key personnel' who cannot be removed from the project without a substantial financial penalty.

SamCERA may be subject to an audit of the security model that is configured for the system. The Bidder should include the requirements gathering, configuration, and documentation of a security model that fulfills SamCERA's needs as part of the scope of the project.

SamCERA expects Bidder to assist in the installation and initial setup of the hardware, commodity software, and database software.

SamCERA expects the proposed cost of the project to include project management and implementation services from Bidder.

SamCERA expects the proposed cost of the project to include any applicable licensing fees and the cost structure (i.e., by module, user count, etc.).

SamCERA expects the proposed cost to include the total cost of all configurations and any required customization costs (if applicable).

SamCERA expects the proposed cost to include testing that will be performed by Bidder; however, user acceptance testing will be performed by staff at SamCERA.

SamCERA expects that Bidder will provide training for key SamCERA staff on the system.

SamCERA also expects that the Bidder will provide guidance to SamCERA's IT staff members on the initial setup of the overall system, including the hardware, software, database, and any integration required during the initial installation and configuration.

SamCERA expects Bidder to include documentation for the system requirement specifications and the system configuration as part of the scope of this project.

11.2. Implementation Plan

The purpose of the implementation plan is to sequence tasks to achieve all required deliverables within an acceptable timeframe, keeping cost and resource availability in mind. The best implementation plans balance risk and efficiency, cost, and quality.

As part of this response, the Bidder is expected to complete **Attachment 11 - Implementation and Staffing Questionnaire** to provide SamCERA with information about planned phases, tasks, subtasks, durations, resources, and milestones for the implementation. Where appropriate in the questionnaire responses, the Bidder should discuss the overall scope of responsibility and provide the details of the tasks that are considered in scope for the implementation for both the Bidder and SamCERA. The questionnaire will request information about Bidder's approach to the following additional aspects of implementation:

- Requirements Confirmation
- Testing
- Training and Training Materials
- Project Documentation
- Risk Mitigation
- Etc.

SamCERA will review the implementation plans for specificity, quality, and perceived risk/efficiency balance. Bidder is encouraged to present the essentials of their specific implementation process and to avoid generic project methodology or marketing language.

12. Artificial Intelligence

In today's ever-evolving technological landscape, SamCERA recognizes that the use of Artificial Intelligence (AI) is becoming increasingly prevalent and transformative across industries. To this end, we are eager to gain a comprehensive understanding of how each Bidder leverages AI within their project implementations and/or how AI is seamlessly woven into their product offerings.

SamCERA seeks to assess the depth and breadth of Bidder's AI integration today and planned innovations on the roadmap to determine the quality and security of the products used.

Bidder must complete and return **Attachment 12 – AI Questionnaire**, to provide SamCERA with the needed information for consideration.

13. Maintenance and Support

Maintenance and Support refer to the Bidder's support of the delivered solution, including help desk support, technical support services, troubleshooting, analysis, project management of support resources, etc. SamCERA is interested in learning about Bidder's customer support model and how Bidder will coordinate updates, upgrades, and technical support both during the implementation project and after go-live. Specific to the implementation project, SamCERA would like to know how Bidder will manage the introduction of product updates and upgrades into the delivered baseline once testing is underway.

SamCERA also needs to understand how the Solution will be covered by warranty. The warranty period must begin at cut-over (go-live) and will last one (1) calendar year from that date. Any defects that stop production and any functions that work incorrectly or cause unnecessary workarounds discovered at any time pre-production or during the warranty period must be corrected before final system acceptance. Any defects found after the warranty period ends will be corrected under maintenance.

The Bidder must complete and return **Attachment 13 - Maintenance and Support Questionnaire** to provide the needed information for SamCERA's consideration.

14. Experience and References

SamCERA wants to understand Bidder's organizational experience and current commitments that may impact the implementation at SamCERA, including prior experience with CERL systems. Using the form provided in **Attachment 14 – Experience and References**, please provide the requested information for similar projects over the last seven (7) years in reverse chronological order (most recent first). For the modules and versions of the proposed solution, please be sure to specify which projects involved the SAME version that is being proposed to SamCERA.

Please also use **Attachment 14** to list at least three (3) references. At least one (1) of these references must be from a United States pension client, one (1) must be from a completed implementation and, if available, at least one reference from a CERL system is desired.

15. Clarifications and Exceptions

While consequential for the evaluation process, SamCERA understands that Bidders cannot always fulfill all requirements. SamCERA understands that Bidders' responses also make certain assumptions that are important for the overall RFP response in determining the final fixed price cost. Therefore, Bidders can add any clarifications to the proposal that they feel are necessary and indicate in which sections of the RFP Bidders take exception to the requirements.

15.1. Clarifications

Using the form provided in **Attachment 15 – Clarifications and Exceptions**, please specify any clarifications to the overall response that the Bidder may wish to make. Where applicable, please reference the section, page, and the specific item or requirement ID to which the clarification applies. The clarification should be written in sufficient detail to explain why it is necessary and the significance of the clarification.

The clarifications should be numbered and grouped by RFP section and should be listed in sequential order of the sections to which they reference. The Bidder's response materials must reference the clarification number.

15.2. Exceptions

Using the form provided in **Attachment 15 – Clarifications and Exceptions**, please specify any exceptions to the content of the RFP. The exceptions should be numbered and categorized by section, referencing the section, page and specific item to which exception is taken. The exception should clearly state the reason the Bidder takes exception to the item in the RFP. If there is a proposed solution or alternative to the exception, the Bidder should provide this information and indicate any cost impacts.

16. Completeness of Response

It is Bidder's responsibility to provide a full and complete written response which does not require interpretation or clarification by SamCERA. The Bidder is to provide all requested materials, forms, and information as set forth in this RFP and within the associated Attachments.

The Bidders' response is required to provide SamCERA with detailed information on all aspects of the proposed solution to include the following:

- Cost of software, including licensing costs plus any initial configuration and customization costs for a hosted solution or, if being proposed, an on-premises installation
- Estimates on hardware costs
- Flexibility of the system
- Compliance with SamCERA business rules and requirements
- “Look and feel” of the system
- Architecture of the solution
- CRM capabilities, either embedded within the PASS or as full integration with a third-party product
- ECM capabilities, either embedded within the PASS or as an integration with a third-party product
- Member Self-Service Portal, including online self-service, communication, and document transmission capabilities
- Employer Portal, including demographic and payroll transmittal reporting, communication, and document transmission capabilities
- Implementation services, including specifications, development, testing, training, and cut-over support
- Annual maintenance and support costs
- History and financial stability of the company
- Any other additional services
- Future upgrade costs and support agreement

17. Evaluation Criteria

17.1. Solution Cost

Cost proposals submitted must use the worksheet provided in **Attachment 16 – Cost Proposal**. SamCERA may reject proposals solely based on the proposed costs. Cost proposals must be fixed price and include all costs for the total PASS solution as described in this RFP, including but not limited to the following items:

- all software comprising the solution
- hardware and other equipment comprising the solution (note: SamCERA may choose to procure hardware through their own procurement channels rather than from the PASS solution Bidder)
- implementation costs, including configuration and/or customization services



- team member hourly rate breakdown, including for Bidder’s project management costs directly supporting the project
- subcontracted services, if any
- maintenance and support fees that would be required for the duration outlined
- travel and expenses, as applicable
- all costs associated with hosting the solution

17.2. Proposal Review

SamCERA will evaluate the Bidder’s proposal according to the criteria below.

Criterion	Criterion Description
Requirements	Ability of the solution to meet SamCERA’s requirements (functional, technical, and cybersecurity) and business rules (where applicable). Ability of user experience to match SamCERA’s needs.
Technical Fit	Overall technical fit to SamCERA, including robustness, scalability, flexibility, ease of configuration, and use of industry-wide technology. Ability to integrate well with other systems, where necessary.
Maintenance & Support	Thoroughness of support program, reputation of company with customers for responsiveness, thoroughness of testing, availability of support resources, and overall cost of future support and upgrades.
Implementation Management	Comprehensiveness of project plan, quality of approach, thoroughness of testing phases, and experience of references in working with project team.
References and Experience	Quality of overall solution, experience with implementation, experience with other defined benefit plans, degree to which projects went over budget/schedule, configuration design and cost, personnel qualifications, and proposal firm’s qualifications.



Criterion	Criterion Description
Company Position in Industry	Company stability, availability of resources, likelihood of company / product line survival, degree of product usage in industry.
Adoption of Artificial Intelligence (AI)	AI adoption as an organization, AI-powered product features, use of AI in work and implementation methods, roadmap for future AI product enhancements.
Cost	Relationship of solution quality to price, configuration and implementation costs, and completeness of pricing for overall project.

18. Submission Requirements

To be considered, all submission materials must be received electronically at SamCERA by 4:00 pm PDT on 04/23/2026.

- **One (1) electronic copy of each document described in the Summary of Response Requirements table below**, which comprises the overall response, in native format. This means that there may be multiple files.
- **One (1) electronic copy of the compiled response** in an Adobe Acrobat PDF. The Bidder should put all documents in the order that they should appear and be printed into one (1) PDF file.
- **One (1) digital video capture**, provided as a web link, that includes the specified functionality areas.

All submissions become the property of SamCERA and will not be returned to Bidders.

All proposals shall be valid until SamCERA completes the award, or for up to one (1) year from receipt of the proposal, and no more than one proposal per Bidder is allowed.

All submissions must be delivered prior to the deadline specified in the selection timeline. Please email electronic submissions to SamCERA at proposals@samcera.gov.





Summary of Response Requirements

Item	Description	Submission Format	Due Date
Bidder Questions (Optional)	Questions submitted about bid qualifications (first round) and RFP content (second round).	Email attachment (preferably MS Word using Attachment 3 - Bidder Questions Form)	03/19/26 (first round) 04/02/26 (second round)
Digital Video Capture	A 10-minute (maximum) digital video capturing features of the proposed solution	Web link(s) provided on Attachment 7, Video Capture	04/23/26
Attachment 1	Company Information	MS Word	04/23/26
Attachment 2	Minimum Qualifications and Intent to Bid	MS Word	03/26/26
Attachment 4	Data Conversion Questionnaire	MS Word	04/23/26
Attachment 5	Functional Requirements Response	MS Word	04/23/26
Attachment 6	Functional Questionnaire	MS Word	04/23/26
Attachment 7	Video Capture (link)	MS Word	04/23/26
Attachment 8	Technical Requirements Response	MS Excel	04/23/26
Attachment 9	Cybersecurity Requirements Response	MS Excel	04/23/26
Attachment 10	Technical Questionnaire	MS Word	04/23/26





Item	Description	Submission Format	Due Date
Attachment 11	Implementation and Staffing Questionnaire	MS Word, MS Project	04/23/26
Attachment 12	AI Questionnaire	MS Word	04/23/26
Attachment 13	Maintenance and Support Questionnaire	MS Word	04/23/26
Attachment 14	Experience and References	MS Word	04/23/26
Attachment 15	Clarifications and Exceptions	MS Word	04/23/26
Attachment 16	Cost Proposal	MS Excel	04/23/26
Attachment 17	Confidentiality Agreement	MS Word	04/23/26

19. Attachments

Attachment 1: Company Information

Attachment 2: Minimum Qualifications and Intent to Bid

Attachment 3: Bidder Questions Form

Attachment 4: Data Conversion Questionnaire





Attachment 5: Functional Requirements Response

Attachment 6: Functional Questionnaire

Attachment 7: Video Capture

Attachment 8: Technical Requirements Response

Attachment 9: Cybersecurity Requirements Response

Attachment 10: Technical Questionnaire

Attachment 11: Implementation and Staffing Questionnaire

Attachment 12: AI Questionnaire

Attachment 13: Maintenance and Support Questionnaire

Attachment 14: Experience and References

Attachment 15: Clarifications and Exceptions

Attachment 16: Cost Proposal

Attachment 17: Confidentiality Agreement

Attachment 18: Sample Contract