



**Government Employees'  
Retirement System of the Virgin Islands**

**Request for Proposal**

**for an**

**Integrated Retirement System Solution**

**Vendor Questions and Answers**

**June 8 2007**

No.	RFP Section	RFP Page	Question / Answer
Q 1	A – 1.10	16	Will GERS consider eliminating or significantly lowering the Performance Bond based on the fact that the RFP is very prescriptive in terms of the mandatory performance and payment milestones?
A 1			<p><i>Section A-1.10 states the following:</i></p> <p><i>A performance bond in the amount of eighty percent (80%) of the total cost of the proposal (including all selected options) will be required for the contract awarded. The performance bond shall be delivered at the same time the contract is awarded. The required bond will be in a form acceptable to GERS; it will be underwritten by a firm acceptable to GERS. Offerors are to include in their proposals both a letter of intent from the bond underwriter in which the underwriter unequivocally agrees to provide such a bond and a certificate of good standing from the state Director of Insurance for the proposed bond underwriter.</i></p> <p><i>GERS is replacing that section with the following:</i></p> <p><i>A performance bond in the amount of eighty percent (80%) of the total cost of the proposal (including all selected options) will be required for the contract awarded. The performance bond shall be delivered at the same time the contract is awarded. The required bond will be in a form acceptable to GERS; it will be underwritten by a firm acceptable to GERS. Offerors are to include in their proposals both a letter of intent from the bond underwriter in which the underwriter unequivocally agrees to provide such a bond and a certificate of good standing from the state Director of Insurance for the proposed bond underwriter.</i></p> <p><i>- OR -</i></p> <p><i>The offer must agree to the following (with no exceptions) following conditions must be met.</i></p> <ol style="list-style-type: none"> <li><i>1. The holdback specified in Section D-6 of the RFP will be increased to 25 percent.</i></li> <li><i>2. Payments will only be made for hard deliverables as specified in Table 53 of the RFP.</i></li> <li><i>3. In the event of termination GERS will receive a refund for all rejected components of the system, while retaining the right to continue using any accepted components.</i></li> </ol>

Q 2	A – 2.1	19	The first bullet point on page 19 indicates “. . . 3 million documents currently residing on paper files located in St. Thomas (2.8 million) and St. Croix (1.2 million).” The sum of 2.8 and 1.2 is 4 million. Please confirm the total number of pages and the number of pages at St. Thomas and at St. Croix.
A 2			<i>The correct total is 4.0 million.</i>
Q 3	A – 3.1	27	In order to allow vendors to provide the best proposal to GERS and due to the level of detail included in the requirements within the RFP, can GERS kindly allow vendors to ask a second round of questions?
A 3			<i>No. Time does not allow a second round of questions. Vendors are encouraged to state their assumptions and exceptions in the appropriate sections of their proposals. GERS, during its review of the proposals will respond to these as appropriate and seek any necessary clarifications.</i>
Q 4	Q – 3.2	28 – 29	Please confirm that Lines 10a & 10b in Table 4 on page 28 refer only to commodity software as outlined in # 10 on page 30.
A 4			<i>That is correct</i>
Q 5	A – 4.1.2, Table 5 & 6	37	Table 5 says that 35% of 6,670 (~2,335) monthly retiree and beneficiary payments are by check, and Table 6 says there are 13,000 monthly checks. Can you kindly clarify what the remaining 10,665 checks are for, who are the recipients, and what the average daily volume of checks are being produced?
A 5			<i>We appreciate the apparent confusion. There are 6,670 current recipients who receive two checks per month for an estimated total check printing of 13,000 per month.</i>
Q 6	A – 4.2	37	What is the current HVAC capacity in BTUs and Watts for the datacenter for which the solution hardware is to reside? What is the margin of unused capacity in Tons, BTU’s and Watts? Does GERS have any plans of upgrading its HVAC capabilities and if so what will it implement?
A 7			<i>The computer room is serviced by a 5 ton capacity with 60,000 BTU’s. It is believed that there is no excess capacity at this time. Once the requirements for the system are known, GERS will have to undertake the appropriate remedial action if necessary.</i>
Q 8	A – 4.2	37	Has GERS conducted network bandwidth baseline tests between the St. Croix and St. Thomas locations as well as for LANs in both locations? If so, can GERS please share this information?
A 8			<i>Yes. The actual throughput as measured by Ackley Communications is 36 MM bits per second. GERS’ current contract with Ackley communications guarantees an average monthly transmission latency of less than 50 milliseconds between GERS equipment and Ackley</i>

			<i>Communications' edge routers. The contract also guarantees an average of less than 1% packet-loss for all valid data packets on any given day of service.</i>
Q 9	A – 4.2	37	What is the current electrical capacity in power Watts of the datacenter for which the solution hardware is to reside? What is the spare capacity in power Watts?
A 9			<i>Each served is on a dedicated circuit. GERS believes that sufficient capacity in power is available to meet the anticipated needs. Actual verification of capacity and any required remedial action will be undertaken after the successful vendor is selected.</i>
Q 10	A – 4.2	37	What is the current software, including version #, that is used to perform backups of the servers? What type of tape unit, including model # and brand, is currently used for backups? Does the existing backup server have spare capacity to be able to add an additional tape drive unit to it?
A 10			Symantec Backup Exec, Version 10d Dell Power Vault 124T Tape Autoloader LTO-3 Tapes: storage capacity 400-800 GB Holds 8 cartridges There is no excess capacity to be able to add another tape drive.
Q 11	A – 4.2	37	What are the # of unused ports on the datacenter switch(es) in which the solution will reside?
A 11			12
Q 12	A – 4.2.10	53	Acknowledging that Pension Payroll checks are currently produced by ADP, is information reconciled back to the current Retirement System manually or electronically through an interface?
A 12			<i>The systems are reconciled manually.</i>
Q 13	B – 1.1.1	60, 140	Please provide details on GERS phone system, including model # and any expansion modules and add-on software version #s?
A 13			<i>GERS utilizes a Nortel Meridian digital phone system with an Avotus Telecom Billing System and Call Pilot. Phone information is the following:</i> <ul style="list-style-type: none"> <li>• <i>STT – Nortel Option 11C Single Cabinet – Release 4, V 2121</i></li> <li>• <i>STX – Nortel Option 11 C Single Cabinet – Release 24.24, V 2111</i></li> <li>• <i>AVOTUS Telecom Billing System, V 3.18</i></li> <li>• <i>Call Pilot, Kit # 2971</i></li> </ul>
Q 14	B – 1.1.16	110	Please confirm that GERS is not responsible for Healthcare enrollment for active members as well as Retirees and Beneficiaries. Assuming this is the case, please confirm that the healthcare deduction amounts for Retiree and Beneficiary Payroll are interfaced into the new system from an external source. Finally, can GERS clarify whether Health Benefits responsibility and administration are future directions of

			GERS and if these are capabilities that they may want the selection solution to be capable of?
A 14			<i>GERS is not responsible for Healthcare enrollment for active or retirement members and beneficiaries.</i>
Q 15	B – 1.1.25	130	Requirement ID 23. Does the reference to “. . . support the existing imaging indices . . .” indicate an existing imaging/ECM system? If so, please describe the existing system and requirements for integration/migration related to that system.
A 15			<i>GERS does not have an existing imaging system. GERS does have a separate database that is used to locate items in member’s files. Information describing the contents of each member’s files has been entered on this database.</i>
Q 16	B – 1.2.4	145	Is the requirement for COLD for storage of documents generated from the line of business solution only or are there other anticipated print streams to be input into the COLD solution? If so, please identify the other COLD input documents or print streams.
A 16			<i>At the current time there are no other anticipated document streams that would serve as inputs to the COLD solution.</i>
Q 17	B – 2.4	178	Is it GERS’ expectation hardware will be purchased from the vendor? Likewise, will installation and support for the duration of the project be the responsibility of the vendor? Please describe the expected role of GERS IT personnel as it relates to hardware/network.
A 17			<i>As GERS IT personnel have limited or no experience with some of the potential tools and applications represented in a new integrated business solution, it is expected that installation and support of the new system will rest with the selected vendor. Note also that option 1 of the RFP deals with continued post-implementation support.</i>
Q 18	B 2.4.6	181	Can photos be scanned in black & white as opposed to color?
A 18			<i>Yes</i>
Q 19	B – 2.7.1	195	Please provide the number of concurrent sessions required for the ECM solution for concurrent sessions of internal users, concurrent employers sessions, and/or concurrent sessions of external users.
A 19			<i>For planning purposes use the same number of concurrent sessions specified in B-2.4.1 of the RFP. Note, however, that GERS has not made a final decision on whether to provide access to imaged documents to employers or the membership at large.</i>
Q 20	B – 2.7.7	197	Is it GERS’ expectation that the vendor is responsible for the entire GERS network or for the portion which pertains to the proposed solution?
A 20			<i>The vendor will be responsible for the portion of the network pertaining to the proposed solution and will work with GERS IT personnel on issues related to the entire network as they may be affected by the solution.</i>

Q 21	B – 2.9.1	198	For the ECM solution, is it intended that all four groups listed on page 198 will have Internet access to documents stored in the ECM solution? Please specify what the requirements are for Internet input and access to documents contained in the ECM system.
A 21			<i>See the response to question 19 above.</i>
Q 22	B – 2.9.2	199	Is it required that the interim imaging system be integrated with IPRO? Is it required that the line of business application be integrated with IPRO? Please identify all integration requirements with the IPRO Document Imaging System.
A 22			<i>IPRO is used by the GERS staff to view employee files within the Department of Personnel. It is anticipated that the interface with this system will continue to be one directional from IPRO to GERS based upon some identifying number such as a social security number. It will be up to the successful vendor to provide for this integration and viewing capability on the GERS monitors.</i>
Q 23	B-2.9.3	199	Please clarify if vendors are to propose check printers and associate post-processing mail equipment as required hardware for this project, or if vendors are to include only the functional ability to generate pension payroll checks such that GERS can choose to turn this functionality on at a later point in time.
A 23			<i>It is a preference of GERS to be able to print checks in house. However, it is possible that personnel or other limitations could prevent this. GERS would like vendors to include in their equipment costs, check printers and associated post-processing mail equipment to allow this capability if desired.</i>
Q 24	B – 3.1.9	213	What are GERS ballpark expectations for estimated total project duration?
A 24			<i>It is difficult to determine in advance what the total project duration will be. That determination will depend upon the vendor's workplan, the options selected, and any special requirements that may evolve between now and the selection of the successful vendor.</i>
Q 25	B – 3.5.1	243	Given the need for vendor access to GERS data during the project, would GERS consider an approach where a copy of GERS data is stored securely at the vendor's data center rather than accessing the same information remotely if the vendor can demonstrate the safeguards and advantages of this approach?
A 25			<i>Yes, subject to specific safeguards and penalties acceptable to the Board of Trustees.</i>
Q 26	B- 3.6.3	251	Will GERS consider proposals from bidders that propose less than the 80% onsite presence of the Project Manager provided the bidder is able to demonstrate significant successful experience implementing pension administration systems without this level of on-site presence?

A 26			<i>Yes. However, the vendor will have to show convincingly that such an approach will not have any deleterious impact on the project. In addition, the vendor must specify at what level an on-site presence will exist and be able to point to similar projects where such a level has been used in the past.</i>
Q 27	B – 3.9.2.4	274	Is there a need by IPERS to own or have use of performance testing tools beyond the execution points mentioned in the RFP?
A 27			<i>The RFP makes no reference to IPERS. If you are referring to network analysis and performance evaluation software mentioned in section B-2.5.4.2, the answer is yes.</i>
Q 28	B – 4.1	291	If possible, can GERS please provide a copy of the current Disaster Recovery Plan to vendors?
A 28			<i>There is no current Disaster Recovery Plan at the present time.</i>
Q 29	B – 4.4	298	In order to contain costs, will GERS consider performing the pilot and continue working on routine file preparation and scanning during review?
A 29			<i>Yes</i>
Q 30	B – 4.4.4	299	Will onsite scanning occur at 1 location? If not please provide further details on number and locations.
A 30			<i>Materials to be scanned are currently located in two locations, St. Thomas and St. Croix. Much of the material stored on St. Croix is duplicative of that store in St. Thomas with respect to member files. To the extent that an appropriate document management plan can be established we believe that the majority if not all scanning can be accomplished in St. Thomas.</i>
Q 31	B – 4.4.1	300 - 301	Is there a requirement to mass update document indices with film roll and frame number in response to the territory statute requirement? Please define the requirements in relation to footnote 5 of Table 50.
A 31			<i>Yes. It is anticipated that the roll and frame number would become part of the document's index.</i>
Q 32	B 4.4.3	303	After documents are scanned, can they be placed into the files in order unstapled or unbound?
A 32			<i>Yes</i>
Q 33	B – 4.4.5	307	Please describe the factors behind the requirement to have converted backfile images delivered in 5 days or less, as this will necessitate very small batches.
A 33			<i>Access to member files is frequent especially as it relates to member loan information. As the backfile conversion process will take a number of months and may span the open period for loan applications, it is anticipated that there will be a high demand for the member files until such time as project is completed and the staff trained on accessing the imaged material.</i>
Q 34	B – 4.4.6	309	Can the capability to extract a set of images be met by providing a back-end process to be able to extract a large

			<p>volume of documents by execution of a query or is it the intent that the vendor develop/configure an interface to facilitate this process? Please describe the vendor's requirements for setup, configuration, documentation, etc. related to the capability to extract a set of images and their indices for copying to micro film.</p>
A 34			<p><i>The ability to extract a set of images can certainly be a back-end process if the offeror believes such a process meets the requirements laid out in the RFP. As an expansion of that information, we offer that the person doing the extraction will typically be (Bob, fill in your own phrase here) an IT specialist who does backup work and other such system support tasks. Thus the expectation of a back-end process is that at minimum there would be a script, stored query, or similar interface or capability that would accept a range of dates (for example) for which the person would like all the images extracted.</i></p> <p><i>As noted in the RFP, this extraction capability may be used to make copies of images that meet particular characteristics onto a CD so that they may be copied to microfilm. Since this capability is specified as part of the day-forward imaging system, the vendor will be responsible for ensuring that the capability exists and is set up, configured, documented, etc. Furthermore, we point out that the image indexes suggested in the RFP include placeholders for microfilm roll and frame. The process for which the vendor is responsible for set up, configuration and documentation must include the ability to appropriately update the images indexes in the imaging system once the copying to microfilm is complete.</i></p>
Q 35	B – 4.5.2	314	<p>Can the requirement that the prime vendor be a United States corporation be waived with respect to a vendor who is incorporated in Canada?</p>
A 35			<p><i>Yes this requirement can be waived. Note that the footnote that appears at the bottom of that section states excludes Canada from the definition of offshore development.</i></p>
Q 36	C – 1.2	342	<p>Can GERS kindly share their ballpark cost expectations for the new system license as well as implementation services?</p>
A 36			<p><i>No. The Board of Trustees is committed to securing the best value for its new system. The cost will be a function of the winning proposal. No specific amount of funding has been set aside for this project.</i></p>
Q 37	C – 1.2	342	<p>Is GERS seeking maintenance and support costs for the new LOB Application Software, and if so, where would you recommend they be entered?</p>
A 37			<p><i>See option 1</i></p>
Q 38			<p>Please provide a list of the vendors who attended the bidders conference.</p>

A 38			<p>The following companies were represented at the mandatory bidder conference:</p> <ul style="list-style-type: none"> <li>• Icon Integration</li> <li>• JEA Pension Systems</li> <li>• Vitech Systems Group</li> <li>• LRS</li> <li>• CPAS Systems Inc.</li> <li>• Omni Systems</li> <li>• Ventera</li> <li>• Sagitec</li> <li>• Communication Technologies Inc.</li> </ul>
Q 39			Is GERS limiting the provided solution to one developed from “scratch” or is the vendor allowed to utilize customized off-the-shelf solutions?
A 39			<p>No, GERS is not limiting the solution to one developed from “scratch”. As stated in Section A-2.2.1, “The objective of this RFP is to solicit proposals from public retirement system implementation vendors for a new, integrated pension administration solution. Specifically, offerors are to propose a solution consisting of the implementation of a fully integrated, best-practices-based retirement system and customizations to that system to meet the mandatory requirements of GERS. The contract to be awarded, as a result of this solicitation, will be for the following solution components: hardware, commodity software, line-of-business (LOB) application software, process reengineering, organizational consulting / restructuring, documentation, testing, implementation, integration, training, warranty, and support.”</p> <p>It is up to the individual vendor to demonstrate their ability to meet this objective and other requirements contained in the RFP through whatever means they believe will achieve the desired result.</p>
Q 40			If subcontractors are used, will they require prior approval by GERS?
A 40			Yes. The use of subcontractors and the requirements applicable to them can be found in the appropriate sections of the RFP.
Q 41			Can GERS provide a PDF version of the RFP Q & A that was provided during the conference?
A 41			An electronic copy of the questions and answers will be provided to all those in attendance at the mandatory bidders conference and will be available on the GERS web site.
Q 42			What is the current level of IT expertise in-house as it relates to evaluating vendor provided solutions?
A 42			The current level of IT expertise in-house supplemented by the resources of LRWL is sufficient to provide the evaluation team with a fair and balanced comparison of vendor proposals. Technical requirements appear in

			Section B-2 of the RFP. Vendor responses to these requirements will be of sufficient detail to facilitate their evaluation by the entire selection committee, not just the internal IT resources.
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