



## **Request for Proposal (RFP) SamCERA.org Website Redesign**

*Proposals must be submitted to:*

SamCERA  
Tariq Ali  
Chief Technology Officer  
[tali@samcera.org](mailto:tali@samcera.org)

By: 5:00 p.m.  
May 2nd, 2014

# Request for Proposal (RFP): SamCERA.org Website Redesign

## Introduction

The San Mateo County Employees' Retirement Association (SamCERA) seeks a website development firm to strengthen its web presence, to improve its capacity to easily edit content, and to improve its ability to communicate with members.

We are looking for a lightweight, flexible site structure that encompasses a modern design, improving the way our brand is communicated online.

SamCERA is interested in receiving proposals from firms that have design and development experience with retirement associations and systems.

Key required features:

1. Collaborative interface, enabling contributions by staff
2. Responsive design; content presented dynamically for several interfaces and devices
3. Easy to navigate and find relevant information
4. Full ADA, Section 508 and W3C Standards compliance
5. Design that reflects the professional nature of SamCERA

## Background

### **SamCERA Retirement Benefits Plan**

SamCERA provides retirement, disability and death benefits to employees of the County of San Mateo, the San Mateo County Superior Court and the San Mateo County Mosquito and Vector Control District. It is a defined benefit retirement system administered in accordance with applicable statutes, regulations and case law. At present there are over 6,000 active and deferred members and over 4,000 retired members and beneficiaries of SamCERA.

There are multiple plans for General members and Safety members. The plans have different benefit factors, maximum annual cost of living adjustments (COLAs), final average compensation periods, final average compensation calculations, eligibility requirements, and contribution rates. Plan membership is for the most part based on date of hire, but it can be affected by a redeposit, upgrade, or membership history with SamCERA or reciprocity.

### **About SamCERA**

SamCERA is governed by the Board of Retirement, which has nine members and two alternates. SamCERA has a Chief Executive Officer who leads a staff of 20 employees. Three are in the I.T. department (the Chief Technology Officer and two technology engineers). There is an Assistant Chief Executive Officer, Executive Secretary, Chief Investment Officer, Investment Analyst, Benefits Manager and benefits staff, Finance Officer and finance staff, Communications Specialist, and a Chief Legal Counsel.

Proposers are encouraged to review SamCERA's website at <http://www.samcera.org> for more information about SamCERA's organization and the retirement benefits that it administers.

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## Current Technology Environment

SamCERA's current technology is comprised of server infrastructure that is 100% virtualized on VMware technologies. Server technologies in use include Windows (2003, 2008), and Linux, and Microsoft Active Directory as the main directory service. GroupWise is used with Novell eDir for email, calendaring, and contacts. SamCERA hosts a GroupWise post office. The County supports the entire GroupWise and eDir system. Staff computers are a mix of mostly laptops and some desktops running Windows 7 and a couple of Apple Mac OS devices.

## Current Website Environment

The San Mateo County Information Services Department (ISD) hosts the current website (SamCERA.org) on a Windows server running IIS. Staff manages the site using FTP and Dreamweaver.

SamCERA also has a web product from their pension software vender, known as Web Member Services (WMS). This web product should at least have a prominent link on the SamCERA website.

## Desired Environment

The County of San Mateo is currently undergoing a website redesign using the Drupal platform. In order to have access to a pool of resources that could assist SamCERA if needed, SamCERA would prefer a solution developed on the Drupal platform. This would also give SamCERA the option to transition the site into the San Mateo County environment if desired. The web server may continue to be hosted by ISD, or at a facility that the vendor recommends.

The vendor will migrate all relevant content from SamCERA's current site to the new site; this should include the basic benefits calculator available on the current site.

## Contents of Proposal:

| Section | Title                                          |
|---------|------------------------------------------------|
| 1       | Cover Letter                                   |
| 2       | Organizational Background                      |
| 3       | Related Projects and References                |
| 4       | Project Management and Development Methodology |
| 5       | Deliverables and Timeline                      |
| 6       | Hosting Options                                |
| 7       | Support and Maintenance Options                |
| 8       | Cost Breakdown                                 |

Items 1 through 8 below contain brief descriptions of material that should be included in this proposal.

1. **Cover Letter** - Proposer shall identify its name and/or the name of the organization that will be providing the services offered in the proposal. The name, address,

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telephone number, facsimile number and e-mail address of a principal contact for information regarding the proposal shall be supplied.

2. **Organizational Background** - Describe your firm's history, qualifications and experience in regards to website design. With the history, include length of time in business, and any experience consulting on similar technology projects, work with public pension systems.
3. **Related Projects and References** - List any related projects and references completed within the last five years. Include the name of the organization, contact person, title, mailing address, email address, and phone number for each reference.
4. **Project Management and Development Methodology** - A description of the process you will use to develop, manage and implement the project.
5. **Deliverables and Timeline** - Proposers should submit a Project Plan which addresses: (1) a detailed description of services, with an estimate of the amount of Proposer staff time for each of the services; (2) timelines for these services; (3) a description of training and documentation deliverables. Proposers are encouraged to also include additional services with a discussion of the reason for these other services.
6. **Hosting Options.** Provide website hosting options recommendations if any.
7. **Support and Maintenance Options.** Attach any Service Level Agreements (SLA) and any other required agreements.
8. **Cost Breakdown.** Please list:
  - a. The rate per hour of the designated Project Lead identified in your response.
  - b. The rate per hour of all key staff that will support the designated Lead.
  - c. Expenses that Proposer anticipates incurring performing the requested services.
  - d. Estimated total charges for the services that will be incurred during the term of this contract, with a not to exceed limit. Explain how this estimate was determined.
  - e. Any proposed billing structure that Proposer would be amenable to, such as, but not limited to, hourly or monthly flat rate for support and maintenance.

### Process

- A. Submission Deadline:  
**May 2nd, 2014 by 5 p.m.**
- B. Electronic Submission Format:  
**Electronic Only**  
Send a single file PDF to:

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If the document is too large to attach, you may use a link to a download.

### C. Questions

Proposers requiring clarification of the intent or content of this RFP, or of the process, may request clarification by submitting written questions no later than **April 25th, 2014**.

All questions must be in writing and sent via e-mail to [tali@samcera.org](mailto:tali@samcera.org). Proposers are requested to not make calls to SamCERA staff.

### D. Evaluation Criteria

SamCERA will evaluate proposals and the qualifications of Proposers. The evaluation criteria will include, but not be limited to experience in providing similar services, project management and development methodology, deliverables and timeline, hosting options, related projects and reference, support and maintenance options, and cost breakdown.

### General Conditions of Submission

- A. By submitting this proposal, your firm acknowledges that SamCERA reserves the right to accept or reject any or all proposals and may waive any requirements of this Request for Proposal if it deems it in the best interests of SamCERA. There is no expressed or implied obligation for SamCERA to reimburse responding firms for any expenses incurred in preparing proposals in response to this request. Costs for developing proposals are entirely the responsibility of the Proposer and will not be chargeable to or reimbursable by SamCERA.
- B. Your firm further acknowledges that all proposals submitted in response to this RFP shall become the exclusive property of SamCERA and shall be subject to public disclosure pursuant to the California Public Records Act (Cal. Govt. Code Section 6250 et. seq.). The Act provides that access to information concerning the conduct of the people's business is a fundamental and necessary right to every person in the state. Public records are defined as any writing related to the conduct of the public's business. There are specific exceptions to the Public Records Act. In the event SamCERA receives a request for inspection of any proposal submitted pursuant to this RFP, it is the responsibility of the organization whose proposal has been requested to assert any right of confidentiality that may exist. SamCERA will not make that assertion on behalf of the Proposer. Absent a judicial determination that the documents are exempt from disclosure, they will be subject to inspection. Submission of a proposal constitutes a complete waiver of any claims whatsoever against SamCERA and/or agents, officers or employees, that SamCERA has violated a Proposer's right to privacy, disclosed trade secrets or caused any damage by allowing the proposal to be inspected.

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- C. All proposals must remain valid for a period of not less than 120 days from the submission. This includes pricing as well as nominated engagement staff.
- D. SamCERA reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected.
- E. SamCERA, in its sole discretion, may enter into contracts with multiple providers.
- F. SamCERA reserves the right to contact current and former clients of the Proposer for information at any time during the proposal process.
- G. SamCERA reserves the right to contact individual Proposers for clarifying information at any time during the proposal process.
- H. SamCERA may modify the RFP prior to the fixed date for submission of proposals by issuance of an addendum.