

**San Joaquin County Employees' Retirement Association
(SJCERA)**

**Request for Proposal No. 2021-03
Pension Administration System Consulting Services**

**Response to Questions from Potential Proposers
April 8, 2021**

1) Pension Software: CORE-37 developed on a FileMaker Pro platform is used to import and track data on all members and beneficiaries.

a. What company developed this software?

Insanely Great, Inc.

b. What company maintains this software?

Insanely Great, Inc.

c. Is current PAS documentation: non-existent, out-of-date, good – used occasionally, great – used all the time?

Most IT processes are well defined.

d. Are SJCERA business processes – well defined and documented, mostly defined for normal processing, out-of-date, or non-existent?

Business processes are somewhat defined, on-going process to improve.

e. Any self-service capability available to members?

No

f. Are metrics collected? What?

No metrics are collected by the current PAS.

g. Is there any workflow? Is it tied to the imaging system?

The current PAS does not have a workflow implemented. SJCERA's imaging system (Optix) has workflow capability, but it has not yet been implemented.

h. How many active users is the current maximum?

50 users, no more than 25 concurrent.

2) Document Imaging: Document Imaging System Optix by Mindwrap, Inc. is being used to scan, store and retain member correspondence and legal documentation.

a. What company developed this software?

Mindwrap, Inc.

b. What company maintains this software?

Mindwrap, Inc.

c. When did SJCERA implement this software?

2004.

d. Is changing imaging systems part of the overall strategy with replacing SJCERA pension administration system?

At this time, SJCERA hopes to be able to continue using Optix and wants to integrate Optix with the new system.

e. How many images are currently stored?

Approximately 1 million records.

f. Are all images in the current system expected to be converted?

See 2d. above.

g. What format (i.e., jpg, pdf, ...) are the images stored in?

PDF format.

3) Email: SJCERA email access and email storage is provided using Kerio Connect including SPAM protection by Proofpoint.

a. Is changing email systems part of this project?

Not at this time.

b. Is SJCERA email access managed by SJCERA or is it part of SJC-ISD infrastructure?

SJCERA's email is managed by SJCERA.

4) File Server: SJCERA provides network storage space and performs nightly back up of our data.

a. Is the hardware for the pension administration system maintained by SJCERA or by SJC-ISD?

PAS hardware is maintained by SJCERA.

b. Is there an inventory of network hardware or network diagram available?

Yes, it will be provided to the successful proposer.

5) a. Does SJCERA maintain the CORE-37 on their own?

SJCERA and Insanely Great, Inc. jointly maintain the CORE-37 System.

b. Who supplies it?

See 5a. above.

c. How much assistance is required by SJC-ISD?

None.

d. How much assistance is required by outside consultants / contract resources?

Outside support is intermittent; however, it is fairly common that the vendor is called upon to trouble shoot issues for biweekly and monthly and annual processes. The expectation is that a new system would not require this level of support on standard processes.

6) Can proposals be submitted via e-mail at WritingPASRFP@sicera.org instead of submitted on one (1) USB flash drive of their proposal in a sealed package?

Yes.