



**Request For Proposal (RFP)
Solicitation No. DCRB-2025-RFP-0500
Benefits Administration Pension System
(BAPS)**

**Pre-proposal Conference
August 15, 2025
9:00 AM - 10:30 AM (EST)**

Agenda

1. Introduction/Attendance
2. Housekeeping
3. Agency Background
4. Requirements/Work Statement Overview
5. SOW Objectives
6. Proposed Logical Architecture
7. SOW Highlights – Technology and Implementation
8. RFP Review – Organization
9. RFP Review – Proposal Requirements and Submission Overview
10. Questions regarding the RFP
11. Important Dates
12. Conclusion

Introduction/Attendance

- Welcome & Introductions
- DCRB Participants
- Sign-in (vendors)

Housekeeping

- Purpose
- Logistics
- Questions

Agency Background

- The District of Columbia Retirement Board (DCRB) is an independent agency of the District of Columbia Government.
- DCRB has the exclusive authority and discretion to manage and control the District of Columbia Police Officers and Firefighters' Retirement Fund and the District of Columbia Teachers' Retirement Fund (the Funds).
- DCRB is also the benefits administrator for the District of Columbia Police Officers and Firefighters' Retirement Plan and the District of Columbia Teachers' Retirement Plan (the Plans).

DCRB Mission Statement

- To serve the interests of the District's Police Officers, Firefighters, Teachers, and their Survivors and Beneficiaries by prudently investing Fund assets and delivering accurate and timely benefit payments with excellent member service.

Website: www.dcrb.dc.gov

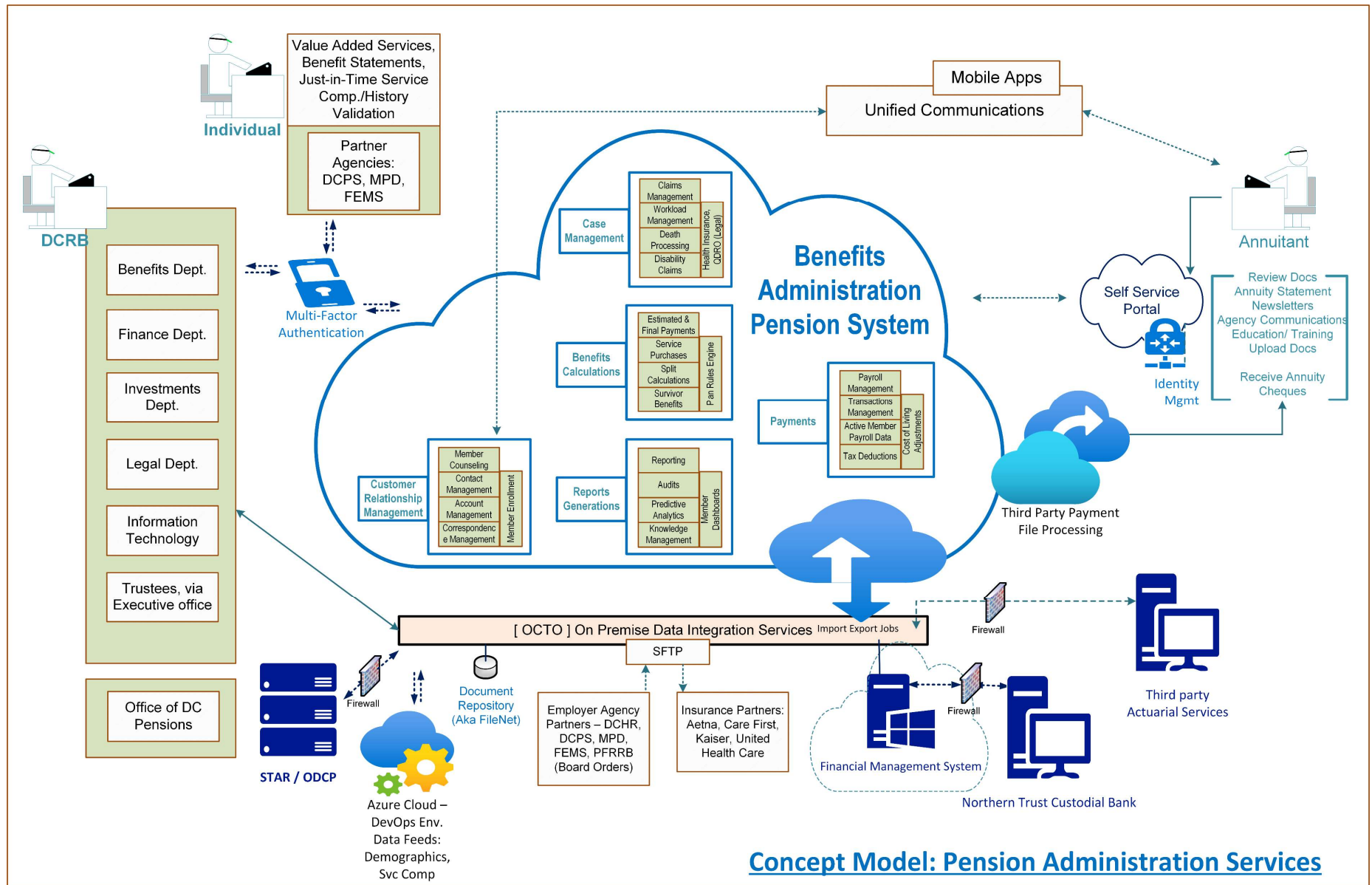
Requirements/Work Statement Overview

- Seeking an end-to-end solution, deployed as a cloud or on-premise solution
 - *[Current System: combination of legacy platforms, supplemental tools, and manual workflows. The core pension system is STAR (System to Administer Retirement), a PeopleSoft-based platform, hosted by ODCP/Treasury]*
- Solution design and configuration must be aligned with DCRB's benefit plans
- Data cleansing and migration from STAR and ancillary data sources.
- Integration with DCRB imaging and document handling systems, District or vendor recommended payroll systems, and external agencies required financial systems
- Self service portal for members and employers
- Documentation including Standard Operating Procedures
- System deployment including training and post-go-live support
- Ongoing maintenance and knowledge transfer to DCRB staff including responding to immediate necessary fixes, monthly updates, and scheduled system enhancements as a result of new legislation or operational needs

SOW Objectives

- Replace the current STAR pension and payroll system
 - Improved service levels for members
 - Improved, centralized management of member and retiree information
 - Increased work efficiency, integrating checklists and automate manual steps
 - Reduce Errors
 - Integration with FileNet System
 - Implementation of business workflows
 - Web-based, self-service functions for members, retirees, and employers
 - Improved accuracy of all information collected, maintained, and provided by the District
 - Improved timeliness and accuracy of responses to members' inquiries
 - Improved system audit and control capabilities
 - Improved system security and controls
 - Ad-hoc and custom reporting tools
 - Secure environment for the receipt, processing, storage, and transmittal of all information related to DCRB business operations
- Functional Specifications:
 - 1.1 Benefit Set-Up: Benefit Calculations
 - 1.2 Benefit Set-Up: Service and Age
 - 1.3 Benefit Set Up: Average and Base Salary
 - 1.4 Miscellaneous Business Rules
 - 1.5 Benefit Payroll
 - 1.6 Health and Life
 - 1.7 Disability
 - 1.8 Cost of Living Adjustments (“COLA”)
 - 1.9 Benefit Estimates
 - 1.10 Death Processing
 - 1.11 Cyclical Batch Processes
 - 1.12 Terminations, Withdrawals, and Deferrals
 - 1.13 QDRO
 - 1.14 Member Account Adjustments
 - 1.15 Purchase of Service
 - 1.16 Active Member Payroll
 - 1.17 Cash Management
 - 1.18 IRC Compliance
 - 1.19 New Member Enrollment
 - 1.20 Member Counseling

Proposed Logical Architecture



SOW Highlights – Technology and Implementation

- In addition to the Technical Requirements, the SOW highlights:
 - Implementation Plan
 - Process Change and Re-engineering
 - Project Management Plan
 - Data Management Plan
 - Test Management Plan
 - Training Management Plan
 - Deployment Plan
 - Document Management Plan
 - Infrastructure Management Plan
 - Enhancement Services
 - Configuration and Maintainability
 - Maintenance and Support Plan
 - Disaster Recovery and Security Testing
- Deliverables
 - Benefits Administration and Pension System; Implementation Plan; Process Change and Re-engineering; Project Management Plan; Data Conversion; Testing / User Acceptance; Training; Documentation; Infrastructure Plan; Enhancement Services Plan; Configuration and Maintainability tools; Service Level Agreement Management Plan; Maintenance and Support Services; Disaster Recovery and Security

RFP Review

- **RFP Organization**

- RFP organized in Sections, from Section A through M.
- Section J identifies the attachments and appendices that are part of the RFP.
- Separate proposals required for technical content and price, in accordance with Section L, and labeled as such.
- Proposals must be submitted electronically via email to the Contract Specialist **on or before 2:00 p.m., September 16, 2025**, the closing time and date.
- Late proposals will not be accepted after the closing date & time.
- Offerors to acknowledge receipt of any amendment to the solicitation in their proposal.
- Proposal will be evaluated based upon the criteria outlined in the RFP (Section L & M).
- The contract will be awarded to the responsible offeror(s) whose offer is most advantageous to DCRB, based upon the evaluation criteria specified in the Solicitation.

RFP Review *(continued)*

Proposal Requirements and Submission Overview

- Technical Proposal

Part I - Technical Proposal

Mandatory Offeror Qualifications - Upon review of compliance with Mandatory Proposer Qualifications noted above, the Offerors shall be evaluated based on the Technical Evaluation Factors listed in Section M.3.1.2

Technical Evaluation Factors & Points

- ✓ I. Executive Summary and Company Background - (5)
- ✓ II. Transition, Implementation, Data Privacy, Security and Risk Mitigation, and Maintenance - (40)
- ✓ III. Innovation and Technology Adoption, Scalability and Flexibility - (10)
- ✓ IV. Customer Support, Team Member Expertise, Staffing Plan, Project Management and Qualifications and Training - (15)
- ✓ V. Past Performance, References, and Legal Issues - (10)

RFP Review *(continued)*

Part II - Technology Demonstration Criteria

- Competitive Range - the top three ranked Offerors (Finalists) will be invited to demonstrate their proposed BAPS solution, and to provide their Best and Final Offer (BAFO)
 - Pre-demo video with the proposed solution architecture and story board (by 10/23/2025)
 - Demonstrations
-
- Price Proposal (20 points)
 - Evaluated objectively and independent of the Technical Evaluation Panel's (TEP) review of technical proposals

Questions regarding the RFP

- Interested vendors may ask questions at the pre-proposal conference, and DCRB's may provide verbal answers. Answers are only intended for general discussion and do not represent DCRB's final position / official response.
- All questions to be submitted in writing to:
 - Ovidiu Puscas, Contract Specialist
 - email: ovidiu.puscas@dc.gov and dcrb.procurement@dc.gov
- Due date for submittal of questions: **August 22, 2025, at 2:00 PM (EST)**

Important Dates

- RFP Published.....8/01/2025
- Pre-proposal Conference8/15/2025
- Questions Due Date 8/22/2025 @ 2:00 pm
- Proposal (response) due date.....9/16/2025 @ 2:00 pm
- Competitive Range Established.....10/09/2025
- Finalists submit pre-demo 90 min video.....10/23/2025
- Technology Demonstrations.....10/28 - 10/31/2025
- Contract Award (*target*).....Early Feb 2026

Conclusion

