

City of Philadelphia Pensions Modernization RFI – responses to vendor questions

Question Number	RFI Section # (If applicable)	Question(s)	Response
1.	Pricing/Licensing Model	Please confirm the number of Philadelphia Pension Board administration users who will require access to the PAS.	Pension Board Benefits Administration: 60 Retiree Health and Welfare Administration: 10 IT: 15
2.		Please confirm the total membership numbers, broken down by cohort. We are interested in knowing of any other member types maintained in the PAS other than Active Employees and Retirees.	Retirees and Beneficiaries/Survivors: 35000 Active Employees: 29000 Vested separated but not retired: 700
3.		During the information session, you advised that member services delivery is currently a manual process. Please can you share the member outcomes and experience you'd like to achieve as part of your PAS modernization project?	<p>PAS modernization initiative is focused on delivering significantly improved member experience by reducing manual processes and providing a modern, intuitive, and transparent service model.</p> <p>The desired outcomes include:</p> <ul style="list-style-type: none"> • Modernizing aging infrastructure • Streamlining member interactions through modern case management, allowing employees and retirees to submit requests, upload documents, and track status online. • Ensuring consistent service delivery through standardized workflows and reduced reliance on manual counselor intervention. • Offering proactive, automated communications to help members stay informed of required actions, deadlines, and key retirement milestones. • Enhancing the retiree experience with accessible benefit statements, tax documents, payment history, and health benefit information and enrollment via self-service.
4.		During the information session, you confirmed that all DC administration was done by a third-party. Can you confirm if any information is required to be stored on the PAS for these members? Similarly, for the hybrid members, what information is	During the information session, we confirmed that all Defined Contribution (DC) administration is handled entirely by our third-party administrator. As a result, no DC

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		<p>required to be stored for these members and, in particular, how would the DC element be included in member statements?</p>	<p>account balances, contribution histories, or investment-related data are stored on the Pension Administration System (PAS).</p> <p>For hybrid members, the PAS is expected to hold the full Defined Benefit (DB) record—service, earnings, beneficiary information, and other data needed for DB calculations. The DC component remains administered externally. The only DC-related data stored in the PAS would be a reference flag or identifier indicating that the member has a DC component.</p> <p>Currently, we do not issue combined statements but will be open to reviewing the proposal.</p>
<p>5.</p>	<p>II. Purpose of Request for Information - About Philadelphia Pension Board: Understanding of as-is technology landscape</p>	<p>Can you please share the current high-level IT application landscape and architecture view for the Philadelphia Pension Board - Pension Administration and Retiree Health and Welfare admin.</p>	<p>The current ecosystem is composed of legacy AS/400 based Pension Payroll, AS/400 based Retiree Health and Welfare, Active payroll integration, financial processing system, and other integrations including the payroll deductions. The architecture is primarily system-centric with limited automation and no centralized enterprise data platform.</p> <p>Pension Administration System (PAS)</p> <ul style="list-style-type: none"> • Core AS/400 based system used for Counselor-dependent retiree and DROP enrollment, demographic maintenance, retirement option elections, benefit status changes, and Pension payment processing • Supports monthly pension disbursements, gross-to-net processing, adjustments, and interfaces with financial systems, union dues deductions, and other deduction vendors • Produces actuarial, compliance, and operational reports • Receives and processes deduction information from the AS/400 based integrated Retiree Health and Welfare system

			<p>Retiree Health and Welfare System</p> <ul style="list-style-type: none"> • Eligibility and premium amounts are calculated manually and then recorded and maintained in the Retiree Health and Welfare application • System provides premium and deduction information to PAS which applies deductions during pension payment processing • Pre-65 commercial plan deductions • Post-65 Medicare standard reimbursement <p>HR/Payroll System (Oracle EBS/ OnePhilly)</p> <ul style="list-style-type: none"> • System of record for employee demographics, service history, earnings, membership tier data, and eligibility indicators • Maintains all contribution and deduction processing for active employees including deductions for all Defined Benefits and Defined Contribution plans • Service and payroll information for PAS benefit processing is extracted via reports and used for benefit calculation <p>Nationwide Retirement Systems</p> <ul style="list-style-type: none"> • Administers the City's 457(b) plans • Maintains balances, investments, and statements for participants • Does not directly interface with PAS <p>Financial/Accounting Systems</p> <ul style="list-style-type: none"> • Currently, mainframes-based system that is used for pension payment disbursements after PAS performs gross-to-net calculations • Supports accounting and treasury functions <p>Reporting and Analytics</p> <ul style="list-style-type: none"> • Reporting is performed within source systems and through legacy reporting tools
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			<ul style="list-style-type: none"> There is no enterprise data warehouse, data lake etc.
6.	XIII. CITY OF PHILADELPHIA SECURITY ADDENDUM - No Offshoring	<p>Our solution will be hosted in the United States and controls will be in place to restrict the data download or transfer outside of the US. Considering this controls, can the below roles be delivered from locations outside of USA or does the entire IT operation has to be completely from USA?</p> <ol style="list-style-type: none"> 1) Service Desk 2) Service Management 3) Security Operation center 4) Batch Monitoring Team 5) Command Centre for alert monitoring 6) DevOPS team for code deployment 	<p>Security addendum wording specific to data reads, "Provider and its subcontractors will not transmit, export, download, access, store, or maintain any City Data beyond the borders of the United States without the City's prior, written consent."</p> <p>Security addendum wording specific to systems reads, "Provider shall not furnish services, software, or hardware from any company or supplier located or based in a country identified as nation-state cyber actor by the Cybersecurity and Infrastructure Security Agency or any successor agency."</p>
7.	II. PURPOSE OF REQUEST FOR INFORMATION	Can you please list the 14 plans that are to be considered in scope for this RFI including a brief description and indicate which ones are DB/ DC/ Hybrid?	Please reference attachment: "Pension Plan Details for RFI Response"
8.	II. PURPOSE OF REQUEST FOR INFORMATION	For Hybrid plans, what is the type of DC plan (e.g.: 401a / 457b / 403b / etc.)? Is this DC component maintained by the City or Nationwide?	For our Hybrid plans (Plan 10 and 16), we offer a 457(b)-plan administered by Nationwide as well as a 401(a) plan. We also offer a voluntary 457(b) plan, which is likewise administered by Nationwide. All 457(b)-contribution processing and 401(a) eligibility and City matching functions are handled through the active payroll system (Oracle EBS HCM).
9.	II. PURPOSE OF REQUEST FOR INFORMATION	The RFI mentions a volume of about 35,000 retirees and 29,000 Active employees. For the purposes of migration are there any additional inactive members to be migrated? What are the volumes? What is the data retention time?	<p>Pension Administration System: Variable Health and Welfare: 10 years retention</p> <p>We have 700 separated vested but not retired members.</p>
10.	Section II (About Philadelphia Pension Board)	<p>Could you please confirm whether data migration is within scope for the retiree health benefit scheme? If so, we would appreciate it if you could share the associated volumes, including:</p> <ol style="list-style-type: none"> 1) Number of systems 2) Number of claims 	We expect Enrollment and deferral data to be migrated for Retiree Health and Welfare system. Claims is not in scope of this RFI.
11.	I.RESPONSE CALENDAR	<p>We understand that City will finalize RFP/next steps based on RFI responses/market COTS solution offerings.</p> <p>a.) Can you please give a high-level view on when City intends to</p>	At this stage, the city has not finalized a budget or timeline for the Pension System Modernization Program. The RFI responses and the review of available COTS market

		<p>start Pension System Modernization Program?</p> <p>b.) What will typical budget allocated by City for such modernization Program?</p>	<p>solutions will inform the development of both the project timeline and the associated funding requirements. Once that assessment is complete, the City will be able to establish the formal schedule and budget for the modernization effort.</p>
<p>12.</p>	<p>I. Current State Architecture & Technology Landscape</p>	<p>Could you describe the key business capabilities supported by the current Pension Administration ecosystem (e.g., enrollment, contributions, benefits calculation, payments, reporting)? Additionally, how are these capabilities distributed across the existing systems?</p>	<p>Retiree and DROP Enrollment & Member Maintenance:</p> <ul style="list-style-type: none"> ✓ The Pension Administration System (PAS) manages onboarding, demographic updates, option elections, and status changes for retired and DROP participants. <p>Service & Compensation Tracking:</p> <ul style="list-style-type: none"> ✓ The City’s HR System (Oracle EBS) maintains service history, earnings data, membership tier information, and eligibility indicators required for benefit calculations <p>Contributions Management:</p> <ul style="list-style-type: none"> ✓ Contributions and eligibility data are maintained within the City’s HR/Payroll system ✓ For Hybrid plans, 457(b) and 401(a) contributions are processed through payroll, with 457(b) accounts administered by Nationwide. These functions are not supported within PAS. <p>Benefit Calculations & Estimates:</p> <ul style="list-style-type: none"> ✓ Benefit calculations and retirement estimates are performed using payroll reports in combination with stand-alone rule based calculation tool. <p>Pension Payments & Disbursement:</p> <ul style="list-style-type: none"> ✓ PAS supports monthly pension payments, gross-to-net processing, adjustments, and interfaces with City financial systems to execute disbursements <p>Retiree Health & Welfare Administration:</p> <ul style="list-style-type: none"> ✓ Eligibility and premium calculations are done

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			<p>manually and then recorded in the Retiree Health & Welfare system.</p> <ul style="list-style-type: none"> ✓ This system maintains the ongoing eligibility and premium data and provides necessary deduction information to PAS, which then applies those deductions to retiree pension payments. <p>Member & Financial Reporting:</p> <ul style="list-style-type: none"> ✓ PAS provides actuarial reporting, compliance reporting, member statements, and routine operational reports. ✓ Additional reporting is supported through the City’s payroll and financial systems, legacy reporting tools, and external vendor data feeds.
13.	I. Current State Architecture & Technology Landscape	Are there City-mandated technology standards or reference architectures (application, data, integration, cloud) that new solutions must align with?	As part of the City’s internal technology implementation gate approval process, the new solution will be subject to systematic reviews of the project’s readiness to progress to the next logical phase of development while adhering to the Office of Innovation and Technology’s Enterprise Architecture, Information Security, and Compliance team requirements.
14.	I. Current State Architecture & Technology Landscape	Is there an enterprise data platform (data warehouse, data lake, or master data management solution) used for pension or HR-related reporting and analytics?	Currently, the city does not have a dedicated enterprise data platform such as a data warehouse, data lake, or master data management solution specifically supporting pension or HR-related reporting and analytics. Reporting for pension, payroll, and retiree health function is currently generated directly from the individual source systems and various legacy reporting tools.
15.	I. Current State Architecture & Technology Landscape	Are there known technical constraints or legacy components within the current Pension Administration landscape that may influence solution design or migration sequencing?	No
16.	Section II (About Philadelphia Pension Board)	As per our understanding, all US citizens are covered under the Federal Medicare health scheme after the age of 65. Since the City of Philadelphia manages retiree health benefits for its employees, please confirm whether all retirees enrolled in this scheme fall under the age of 65. If this understanding is correct, then the total	We manage eligible retirees based upon their union affiliation and retirement health of members who meet eligibility criteria. City provides Retiree Health and Welfare for only up to 5 years for any eligible retiree. They have an option to defer that election indefinitely. We also offer

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		number of retirees mentioned in the RFI (35,000) would fall within this age group, and individuals exceeding this bracket would no longer be part of the program.	post-city credit plan which is similar to Medicare advantage plan. All members require 10 years of service (and age requirements met) with the City to be eligible to receive the entirety of health and welfare benefits. Exempt employees do not need 10 years of continuous service. All other employees, regardless of union affiliation, require 10 years and age requirement of continuous service.
17.	V. Security, Privacy & Compliance	In addition to City policies, are there specific federal, state, or actuarial compliance standards that govern data handling and system controls?	No
18.	Section II (About Philadelphia Pension Board)	We understand that the City manages retiree health benefits, including Medicare, Rx, dental, and vision coverage. We would request City to share the details (Plans, Covers, Benefits) which is included in the retiree health benefit scheme.	Refer to the attached retiree OE guide
19.	Section II (About Philadelphia Pension Board)	We understand that the retiree health benefit plan and the administration of its underlying plans are managed solely by the City of Philadelphia. Please confirm if there are any empaneled third-party insurers involved in managing or administering the plans under this scheme. If yes, kindly provide details of such insurers and the plans they offer.	Refer to the attached retiree OE guide, with remaining details addressed during RFP stage.
20.	Section II (About Philadelphia Pension Board)	As per the RFI we understand that reimbursement claims for retiree health benefits will be part of this solution. Please let us know if cashless/pre-auth of claims will be part of the solution. Also, please share a flow diagram outlining the end-to-end process of the retiree health benefit scheme.	Claims processing is not in scope of this RFI/RFP
21.	Section II (About Philadelphia Pension Board)	We understand that the City manages retiree health benefits, please confirm what is the existing system the City is using for maintaining and managing the system of records. Please also confirm what are the most critical pain points that needs to be addressed first.	Current retiree health benefits system is also custom AS/400 based application integrated with Pension Payroll Administration system. Current pain points include: <ol style="list-style-type: none"> 1. Aging infrastructure 2. Manual processes and counselor dependency 3. Limited self-service functionality 4. Lack of automated workflow 5. Lack of TPA integrations for Retiree Health and Welfare
22.	Section II (About Philadelphia Pension Board)	Could you please share the complete list of integration touchpoints to be delivered as part of the program scope?	It will be delivered as a part of RFP.

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23.	Section II (About Philadelphia Pension Board)	We would like to know the integration details (API, file based, data integration system) for HR administration systems, CRM, finance systems, any third-party health plan administrator etc.).	HR and Finance systems can support all the mechanisms you mentioned in your question
24.	VI. ANTICIPATED SOLUTION REQUIREMENTS	We understand that the scope includes report generation. Could you please confirm the number of reports to be generated? Additionally, we would appreciate details on the key regulatory and management reports required.	Given that this will be a complete system transformation, we expect data transformation as well. With that in mind, we would need you to bring your expertise to the table in terms of what standard reports are leveraged by other Pension/Retiree Health and Welfare funds.
25.	VI. ANTICIPATED SOLUTION REQUIREMENTS	We understand that the scope includes document generation. Could you please confirm the number of documents to be generated?	Standard document generation including enrollment statements, pay statements, benefit enrollment statements, 1099R, etc
26.	VI. ANTICIPATED SOLUTION REQUIREMENTS	We understand that only the member portal and the employer portal will be positioned as part of the scope. We will consider integration with existing provider portal used by City. Kindly confirm if the understanding is correct.	If this question pertains to Health and Welfare TPAs, we expect asynchronous integration.
27.	VI. ANTICIPATED SOLUTION REQUIREMENTS	What are the top-priority use cases for both the member and employer portals?	<p>Top-Priority Use Cases – Member Portal</p> <ol style="list-style-type: none"> 1. Self-Service Profile Management Update address, contact details, beneficiaries, direct deposit, and tax withholding preferences. 2. Retirement & DROP Application Intake Submit retirement applications, upload required documents, track application status. 3. Document Upload & Secure Messaging Submit supporting documents (e.g., QDROs, proof of age, service buyback forms) and communicate securely with the Pension Office. 4. Member Statements & Notifications Access monthly/annual statements, 1099-R forms, and system alerts 5. Retiree Health & Welfare Enrollment & Maintenance View health & welfare eligibility, premiums, coverage options, and annual open enrollment selections. <p>Top-Priority Use Cases – Employer Portal</p> <ol style="list-style-type: none"> 1. Contribution & Deduction Reporting Submit payroll contributions (DB, 457(b), 401(a)), adjustments, corrections, and reconcile payroll files.

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			<p>2. Service & Earnings Verification Provide monthly or bi-weekly service and compensation data feeds to support calculations and eligibility.</p> <p>3. Case Management for Transactions</p> <p>4. Document Submission & Workflow Approvals (Upload employment documents, approve transactions, and interact with PAS workflows).</p>
28.	VI. ANTICIPATED SOLUTION REQUIREMENTS	What are the projected growth trends for employer onboarding over the next five years?	None
29.	VII. Measurement of Success	What metrics would the City consider most important for measuring success post-implementation (e.g., processing time, error rates, member satisfaction)?	Accuracy of proposed data, member satisfaction, administration effectiveness, reduction in processing time, reduction in manual processing
30.	VII. Measurement of Success	Are there specific modernization or digital transformation goals (cost reduction, transparency, self-service, resiliency) that should be prioritized in the solution design?	<ul style="list-style-type: none"> • Modern self-service for members and retirees • Reduced manual workload and administrative cost • Transparent, traceable, rules-driven calculations • Strong system reliability and workflow automation • Tight integrations with HR/payroll, and other systems
31.	Information Session Question	For the Hybrid Benefits the City offers its members, does the City expect the DC Contributions to flow through the PAS to the DC Administrator?	No
32.	Information Session Question	For the Hybrid Benefits the City offers its members, is the DB portion currently handled within the existing pension system or another system?	Yes, but deductions are processed in HR system
33.	Information Session Question	Does the City have reciprocity / reciprocal service scenarios that need to be tracked in the pension system?	<p>No, the city does not have reciprocity agreements with other retirement systems. Instead, the City supports service purchase scenarios, where eligible members may buy back certain types of prior service (such as military service, prior City service, or other permitted categories) in accordance with plan rules.</p> <p>Any future Pension Administration System should therefore support:</p> <ul style="list-style-type: none"> • tracking purchased service separately from earned service, • capturing the service purchase type and calculation

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			<p>method,</p> <ul style="list-style-type: none"> • handling payment methods (lump sum, installment, payroll deduction), and • applying purchased service appropriately in eligibility and benefit calculations. • Provide automated notifications
34.	Information Session Question	In current state, how large is the current IT team servicing the Pension System? How much ownership do they have today over changes or enhancements to the existing system?	5 members
35.	Information Session Question	What is the timeline for next steps after the RFI, especially around RFP development and release timing?	We have no approved timeline to share yet.
36.	General Question	What is the average number of concurrent users that would need access to the platform (fund office staff)? For purposes of this question, “concurrent users” refers to fund office staff members who are actively performing an action within the system simultaneously. If this number is not known, what is the total fund office staff count currently?	<p>Pension Board Benefits Administration: 60</p> <p>Retiree Health and Welfare Administration: 10</p> <p>IT: 15</p>
37.	General Question	Will the Board make the recording of the June 3 Information Session available to vendors? If so, please provide information on how it may be accessed.	June 3 information session recording will not be made available for external use.
38.		How does a potentially updated pension administration system (PAS) fit into the City of Philadelphia’s current member service strategy?	An updated Pension Administration System (PAS) is central to advancing the City of Philadelphia’s member service strategy. A major objective of the modernization effort is to transition away from the current AS/400-based legacy infrastructure and replace it with a modern, scalable platform that supports improved member experience, enhanced automation, and stronger operational efficiency.
39.		What aspects of the current system work well? What aspects of the system could be improved upon?	<p>What works well today:</p> <ul style="list-style-type: none"> • Stable core operations • Established workflows • Trusted source of pension data <p>What could be improved:</p> <ul style="list-style-type: none"> • Aging infrastructure AS/400 based system • Lack of modern self-service • Constrained integration capabilities
40.		What is the current state of participant data? Is historical data available on one consolidated administration platform in an	Yes

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		electronic format?	
41.		Please confirm your willingness to consider a solution that does not provide an integrated imaging / document management system. Would the City consider continuing use of your existing document solution?	We are open to considering solutions that do not offer an integrated imaging/document management system.
42.		Who is the current custodian of plan assets. Does the custodian provide benefit payment services in the current solution. Would the City be willing to explore integration with the current custodian or a new custodian to support payment and tax withholding and reporting activities.	Payment services are managed internally by the city. We expect new solution to provide payment services, tax withholding, and reporting.
43.		The RFI indicates that the system must support administration for 35,000 retirees and 29,000 Active members. Please confirm the number of terminated participants who are due a future benefit.	700
44.		Please elaborate on the requirement for Employer and member invoicing. Is this related to Pension administration, Retiree Medical processing or both?	Member invoicing applies to both Pension Administration and retiree medical processing. <ol style="list-style-type: none"> 1. We allow members to purchase service credits for leave of absence. Such purchases require member invoicing. 2. We have 4 employers and need an ability to invoice them for member contributions and adjustments 3. For members who don't receive pension but are eligible to enroll in Health and Welfare, we need ability to electronically invoice via system
45.	June 3 rd Information Session	During the vendor Information Session on June 3 rd PBOP mentioned that the implementation of Pension and Retiree HW systems would occur on separate timelines with separate funding. Can BPOP please provide some more detail regarding the timelines? We infer that Pension is the priority but would like confirmation.	As noted in the RFI, the Board is open to pursuing either a combined single solution that supports both Pension Administration and Retiree Health & Welfare or separate solutions delivered by one or more vendors. Vendors should outline how their proposed implementation approach – whether parallel or sequenced – would work in the context of their recommended solution structure (single or separate systems) and describe how they would ensure uninterrupted services to retirees throughout the transition.
46.	June 3 rd Information Session	Could BOP please confirm that the application used to administer the Retiree HW plan sits on an AS 400 platform? Can BPOP provide more data regarding this application and its functions (e.g.,	Current retiree health benefits system is also custom AS/400 based application integrated with Pension Payroll Administration system.

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		enrollment, life event processing, carrier interfaces)?	<p>Retiree Health and Welfare System</p> <ul style="list-style-type: none"> • Eligibility and premium amounts are calculated manually and then recorded and maintained in the Retiree Health and Welfare application • System provides premium and deduction information to PAS which applies deductions during pension payment processing
47.	June 3 rd Information Session	During the vendor Information Session on June 3rd PBOP mentioned that benefit calculations, estimates and member experience is manually delivered by counselors. Are there any calculation tools or applications used in this process? Can BPOP provide an overview of how an employee requests/receives a pension estimate today?	<p>We currently perform benefit estimates using earnings and service data obtained from HR and payroll systems. Counselors rely on standalone rule-based calculation web tool to produce retirement estimates..</p> <p>Active employees typically request pension estimates by scheduling a counseling appointment through their HR manager. Separated employees contact the call center, where an employee schedules an appointment with a BOP counselor. During the appointment, the counselor gathers the necessary employment and earnings information from HR/Payroll system, performs the calculation using the standalone calculation tool, and delivers the estimate to the employee through the designated communication method (e.g., email, mail, or in-person discussion)</p>
48.	II. PURPOSE OF REQUEST FOR INFORMATION	There are several references to the International Organization for Standardization Open Systems Interconnection (OSI) model in the RFI. How does BPOP currently comply with the standard? Is there a concern about the vendor system's ability to integrate/ interface with the many city and third-party applications required to administer the Pension and Retiree HW plans? Are there particular pain points or data issues that BPOP is trying to resolve when adopting a new application?	<p>Ensuring system access via integration points or APIs will need to be catalogued and accounted for during development to ensure business continuity in deployment/implementation project phases. No major concerns regarding the system's ability to integrate.</p> <p>At this time, there are no specific data issues which need to be resolved.</p>
49.	II. PURPOSE REQUEST FOR INFORMATION	For each of the 14 pension plans referenced, please indicate plan classification (DB, DC, Hybrid), employer sponsorship, and whether the plan is open, closed, or frozen to new entrants. For Retiree Health, please indicate enrollment counts by Medicare-eligible vs. pre-Medicare and by self-insured vs. fully insured.	<p>Please reference attachment: "Pension Plan Details for RFI Response"</p> <p>Member enrollment counts for each City group:</p> <p>City Administered Plan (CAP) Retirees</p>

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			<ul style="list-style-type: none"> - 1136 City Credit commercial plans (Non-Medicare) - 578 City credit Medicare - 710 Post City Credit - 230 deferred members <p>Local 22</p> <ul style="list-style-type: none"> - 218 members under 65 retired on the Health Plan - 267 retired members over 65 years old - 341 members purchased Post Retirement medical thru Sick conversion - 50 deferred members <p>DC33</p> <ul style="list-style-type: none"> - 1165 City Credit members - 368 Post City Credit - 248 deferred members <p>LEHB</p> <ul style="list-style-type: none"> - 1633 city credit members - 460 Post City credit - 488 deferred members <p>DC47</p> <ul style="list-style-type: none"> - 525 city credit members - 277 Post City Credit - 83 deferred members
50.	VI. ANTICIPATED SOLUTION REQUIREMENTS	If the Board procures PAS and Retiree Health systems from separate vendors, what integration model is preferred — real-time API, batch file exchange, shared data layer, or vendor-defined? In a dual-vendor scenario, who is expected to own ongoing integration maintenance and the cost thereof?	<p>The Board is open to multiple integration models if the PAS and Retiree Health & Welfare systems are procured from separate vendors. Vendors may propose real-time APIs, batch file exchanges, shared data layers, or a vendor-defined integration approach. The City’s priority is ensuring data accuracy, operational continuity, and maintainability, rather than prescribing a specific architecture at this stage.</p> <p>In a dual-vendor scenario, vendors should clearly define their recommended integration approach and outline any required responsibilities from the City or the other vendor. Ongoing integration, maintenance and associated costs should be identified and included in the proposed solution.</p>

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			The Board anticipates that integration ownership may vary depending on the architecture proposed and therefore remains open to vendor-recommended models as long as they ensure reliability and sustainability.
51.	VI. ANTICIPATED SOLUTION REQUIREMENTS	Is the Board open to concurrent (rather than sequenced) implementation of PAS and Retiree Health if a single vendor can resource both workstreams in parallel without compromising operational continuity for retirees?	<p>Yes, the Board is open to both sequenced and parallel implementation approaches. Vendors may propose either method based on what they believe provides the best balance of efficiency, risk management, and operational continuity.</p> <p>As noted in the RFI, the Board is also open to pursuing either a combined single solution that supports both Pension Administration and Retiree Health & Welfare or separate solutions delivered by one or more vendors. Vendors should outline how their proposed implementation approach – whether parallel or sequenced – would work in the context of their recommended solution structure (single or separate systems) and describe how they would ensure uninterrupted services to retirees throughout the transition.</p>
52.	VI. ANTICIPATED SOLUTION REQUIREMENTS	How many historical data sources will need to be converted (e.g., service history, contribution history, payment history, beneficiary history, document images), and are there known data-quality issues that vendors should account for in implementation assumptions?	Depending on the solution, we would be open to discussion on the various data sources that will need to be converted
53.	VI. ANTICIPATED SOLUTION REQUIREMENTS	Please confirm the pricing horizon ROM responses should reflect (e.g., 5-year or 10-year total cost of ownership) and the population scope to be priced (total members ~64,000, active members ~29,000, retirees ~35,000, or another defined population). Should ROM pricing be presented as a single integrated bundle, or as separable line items by capability domain?	<p>The ROM estimates should reflect a 5-year total cost of ownership model. This should include line items for licensing, hosting, implementation, integration, support, and ongoing maintenance over the 5-year period.</p> <p>ROM pricing needs to be presented as separate line items by capability domain and underlying components. Also, we would like to understand the cost savings for option 3 below due to synergies in implementation/support</p> <ol style="list-style-type: none"> 1. Core Pension Administration System 2. Retiree Health & Welfare Systems 3. Core PAS + Retiree Health & Welfare Systems

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54.	VI. ANTICIPATED SOLUTION REQUIREMENTS	<i>“Allow for divorce calculations, divorce reductions, divorce deductions, and alternate payee account creations (QDRO) – Do you have Ocular text ability?”</i> Please expand on your expectations around Ocular text ability.	When we refer to “Ocular text ability” in relation to document processing, we are asking whether your system can support the automated extraction, interpretation, and structured capture of text from uploaded documents. We want to understand whether the proposed solution can: <ul style="list-style-type: none"> • Accept uploaded divorce/QDRO documentation in formats such as PDF, scanned copies, or image files • Use optical character recognition (OCR) to convert that document text into machine-readable data • Identify and extract key data elements • Populate system fields or workflows based on extracted values • Support validation/review workflows so pension/Health and Welfare staff can confirm/approve extracted data • Attach and store processed documents as a part of the members records with appropriate tagging and indexing
55.	VI. ANTICIPATED SOLUTION REQUIREMENTS	<i>“Maintain web accounts for member, employer, and PHIP TPA portals.”</i> Please provide more detail about the features and functions of the PHIP TPA portal. Please expand on the expected integrations with this portal.	Currently, our Retiree Health and Welfare system does not integrate with PHIP TPA portals rather staff manually enroll retirees in 4-5 systems for Health and Welfare enrollment. We expect the new system to offer standard automated demographic and enrollment integration with PHIP TPA.
56.	Anticipated solution requirements	Can you share the total number of staff that are currently allocated in the areas of member and administrative support?	Pension Board Benefits Administration: 60 Retiree Health and Welfare Administration: 10 IT: 15
57.	Anticipated solution requirements	Can you share the total number of Terminated Vested participants?	700
58.	Anticipated solution requirements	Can you share any additional details about the 14 DB plans such as status, formulas, eligibility, complexity, grandfathering etc.?	Please reference attachment: “Pension Plan Details for RFI Response”