



Request for Proposals

Website Development Services

RFP #C-2020-2

Issued March 3, 2020

Proposals Due April 3, 2020

Iowa Public Employees' Retirement System

7401 Register Drive Des

Moines, IA 50321 Phone:

515-281-0020

www.ipers.org

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PART 1

PURPOSE, MINIMUM QUALIFICATIONS AND SCOPE OF SERVICES

A. PURPOSE

This Request for Proposal (“RFP”) is issued by the Iowa Public Employees’ Retirement System (“IPERS” or “System”) for the purpose of hiring a vendor (“vendor”) to work in partnership with the IPERS team to update www.ipers.org based on the organization’s [strategic plan](#) and communication goals. This RFP is designed to provide vendors with the information necessary to prepare a competitive proposal. The RFP process is for IPERS’ benefit and is intended to provide IPERS with competitive information to assist in the selection process. It is not intended to be comprehensive. Each vendor is responsible for determining all factors necessary for submission of a comprehensive proposal.

B. IPERS & WWW.IPERS.ORG OVERVIEW AND COMMUNICATION STRATEGIES

IPERS is a cost-sharing, multiple-employer, contributory defined benefit public employee pension plan created and governed pursuant to Iowa Code Chapter 97B. The System covers approximately 360,000 active, inactive and annuitant members. IPERS consists of three membership groups: Regular members, and two Special Service groups (Sheriffs/Deputy Sheriffs members and Protection Occupation members). Complete background information is available at www.ipers.org.

The current version of www.ipers.org launched in 2015. It is currently operating on Drupal 7.69. Other than updating copy, modules as necessary, home page banners and PDF files, the site has changed minimally since its launch.

IPERS offers My Account, a personalized pension management tool as part of its pension administration system. My Account allows IPERS members to update their contact information, change their beneficiary, etc. IPERS’ website is a conduit to this tool, and IPERS does not intend to replicate My Account’s functionality on www.ipers.org.

WWW.IPERS.ORG AUDIENCES

1. Active Members: Members who are currently working in IPERS-covered positions
Inactive Members: Members who no longer work in an IPERS-covered position but have not moved their IPERS contributions to a different retirement savings account
Beneficiaries/Annuitants: The person or people who are eligible to receive benefits upon an IPERS member’s death
2. Retirees (Average age = 61, Averages years of service = 23)
3. Employers
4. Iowans
5. Local, regional and state lawmakers

WWW.IPERS.ORG DEMOGRAPHIC DATA

- % usage by age: 25-34=23.3%, 35-44=19.4%, 45-54=20%, 55-64=20.6%, 65+=11.4%
- % Male: 48%
- % Female: 52%
- Average time on site: 2:10
- Average number of pages/session: 2.31

IPERS COMMUNICATION GOALS

- I. Strategic Plan Goal: Increase members' awareness of the importance of supplemental retirement savings to help combat inflation
 - a. Communications Goal: Increase the percentage of new members who have NO additional retirement savings
 - i. Strategy: Implement "Sock It Away" Campaign to generate greater retirement savings among members
- II. Strategic Plan Goal: Leverage technology to enhance communications and service delivery
 - a. Communications Goal: Generate new My Account users
 - i. Strategy: Implement a plan to acquire new My Account users
 - b. Communications Goal: Integrate and streamline print publications, web site, email to better target messages and audiences, improve the user experience and reduce costs
 - i. Strategy: Implement a review of existing tools, establish goals for each and make necessary enhancements

C. BUDGET & TIMELINE

Tentatively, IPERS will invest up to \$100,000 in the development of an updated website that will ideally roll out no more than four months after a contract is executed.

D. MINIMUM QUALIFICATIONS

The successful vendor must meet *all* of the following Minimum Requirements. Failure to do so shall result in rejection of the proposal. The vendor must:

- Have at least three years of experience providing Drupal website development and system support.
- Have at least three current or prior contracts to provide Drupal website development and system support.
- Provide three references from previous Drupal website development and system support engagements.
- Support IPERS' websites remotely via VPN.
- Supply computers, software and other necessary equipment required to provide remote Drupal 8 website development and system support.
- Supply a single point of contact for daily interaction with IPERS.
- Assure that www.ipers.org is continually reviewed and updated to ensure compliance with the most current version of the Web Content Accessibility Guidelines (WCAG).
- Agree to comply with Iowa Enterprise Standards as outlined here: <https://ocio.iowa.gov/standards>
- Have demonstrated experience with remediating and preventing security defects within www.ipers.org.
- Create and share with IPERS all project documentation, including charters, functional requirements, user stories, project plans, project status reports and technical specifications.
- Provide regular status reports, including, but not limited to, milestones, tasks completed, test results, risks, issues and budget information.
- Participate in routine and ad hoc meetings as requested by IPERS for the purposes of planning, maintenance, oversight, performance and management of www.ipers.org.
- Support all aspects of Drupal, PHP, Apache, MySQL and www.ipers.org in a still-undetermined cloud hosted environment.
- Support www.ipers.org with all website software and website system components above the operating system under the direct instruction of IPERS in compliance with evolving State of Iowa guidelines, policies and procedures.
- Support existing third party products, including financial calculators, etc.

E. SCOPE OF SERVICES / DELIVERABLES

The scope of services defined in the final contract between IPERS and the vendor will be binding and will supersede this section of the RFP if different from the scope of services defined here.

Work with the IPERS team to create a strategic plan for www.ipers.org based on IPERS' strategic plan and communications goals. This includes ongoing support and maintenance of the Drupal content management system.

Collaborate with the IPERS team to update www.ipes.org to deliver targeted, timely, relevant and appropriate content to IPERS' various audiences.

Drupal 8 version must be compatible with Drupal 9. Any contributed and/or custom modules (and themes) used must be compatible with Drupal 9 (no deprecated code).

Take the time to understand IPERS, its audiences and the needs of its members to determine a plan to create and curate content that appropriately delivers key information. The vendor may work with IPERS' communications agency of record that develops IPERS' brand standards and must have experience creating websites that support a broader, comprehensive communications plan.

Deliver targeted, timely, relevant and appropriate content to IPERS' various audiences. To the greatest extent possible, the site should demystify the complexities of retirement planning by presenting information in a way that's easy to use and easy to understand. IPERS' pension program is multifaceted and complex, and most members rightly choose to call IPERS benefit counselors for individualized help. The website should complement personalized counseling by helping members fundamentally understand IPERS and provide them the information necessary to have an informed conversation about their retirement future.

The updated site should logically compartmentalize information intended for various, diverse audiences and offer logical, intuitive navigation. IPERS views its website as its primary source of information and intends to continually monitor and enhance the site to ensure that content is successfully delivered based on several factors, including timeliness and performance.

Have expertise in digital and responsive design, SEO, VEO, analytics, social integration and digital content strategy development.

After the site's launch, the vendor will serve as an extension of the IPERS team to provide ongoing support and maintenance of the Drupal content management system and www.ipers.org, specifically offering website expertise and proactively recommending best practices, including the newest and most appropriate digital technologies that meet the site's goals. IPERS expects a "warranty period" directly after the site's launch that would cover any found defects or missing functionality.

PART 2

PROPOSAL SUBMISSION INFORMATION

A. INSTRUCTIONS FOR SUBMITTING PROPOSALS

1. Vendors responding to this RFP must provide answers to the questions posed in Parts 3 of this RFP. All proposals must be complete in every respect and must answer concisely and clearly all questions proposed by the RFP. Late proposals will not be accepted.
2. Proposals shall be submitted with a cover letter stating in the affirmative that the firm meets each and all of the Minimum Qualifications listed in Part 1.D of this RFP, that the firm is able and willing to provide the type and level of services required to fulfill the mandate proposed in this RFP and that the firm's proposal is binding for 180 days from the date of the proposal. The cover letter should also include either an affirmative compliance statement or a disclosure statement relative to IPERS' Ethics Policy (see Part 2.F below). Attach said cover letter as **Appendix A** to the proposal.
3. The cover letter and the offer made by the proposal, and any clarifications to that proposal shall be signed by an officer of the vendor or a designated agent empowered to bind the vendor in a Contract. The cover letter must also identify any sections of the proposal that the firm is identifying as confidential. (See Disclosure of Proposal Content below.)
4. Proposals should follow the order of questions as they are asked in Part 3 of this RFP. In response to each question asked in Part 3, restate the question (denoted by a number or a letter) in bold font followed by your answers stated in regular font. Responses should be thorough and answer the specific question asked, including the issues addressed in any bullet points following a question.
5. Supporting material must be clearly referenced to the appropriate question. Information and materials that are strictly promotional in nature should not be used.
6. Verbal communication with IPERS' Investment Board, Benefits Advisory Committee members and IPERS staff during the selection process is greatly discouraged. Vendors will be given the opportunity to submit written requests for clarification of questions or terms contained in the RFP. In all cases, written communications will override verbal communications.
7. Proposals must be received no later than 4 p.m. Central time, April 3, 2020.

Vendors must e-mail one complete electronic version of its proposal and all appendices to shawna.lode@ipers.org. The e-mail subject line should clearly indicate that it contains a proposal submitted in response to RFP #C-2020-2. The proposal must be attached as a PDF with the vendor's name included in the file name. If the proposal contains more than one PDF file, you may compress the files and submit in a ZIP file that clearly identifies the firm in the file name.

B. DISCLOSURE OF PROPOSAL CONTENT

The laws of Iowa require that the content of bidders' proposals be maintained in confidence prior to the issuance of a notice of intent to award a contract. If IPERS issues a notice of intent to award a contract at the conclusion of the selection process, the contents of all proposals, excluding confidential information, will be placed in the public domain and be open to inspection by interested parties. Trade secrets or proprietary information that are recognized as such and protected by law may be withheld, but only if designation of such sections is stated in proposing firms' cover letter and confidential information is clearly identified as such on each of the applicable pages within the body of the proposal.

Any proposal that contains confidential information must be conspicuously marked on the outside as containing confidential information, and each page which confidential information appears must be conspicuously marked as containing confidential information. Identification of the entire proposal as confidential shall be deemed nonresponsive and disqualify the vendor.

If the vendor designates any portion of the RFP as confidential, the vendor must submit a separate electronic "excised copy" of the original proposal from which the confidential information has been excised at the same time that they submit the original (unexcised) proposal. The confidential information must be excised in such a way as to allow the public to determine the general nature of the material removed and to retain as much of the proposal as possible.

The vendor's failure to request confidential treatment of material shall be deemed by IPERS as a waiver of any right to confidentiality that the vendor may have had.

C. REJECTION OF PROPOSALS

1. IPERS reserves the right to reject without penalty any or all proposals in whole or in part received by this request, due to noncompliance with the requirements of this RFP or for any other reason. Issuance of this RFP in no way constitutes a commitment by IPERS to award a contract or to enter into a contract with a successful bidder. IPERS further reserves the right to cancel this RFP, to issue a new RFP or to award a contract in whole or in part if deemed in the best interest of IPERS. The RFP and the RFP process are for the sole benefit of IPERS and its members. IPERS will not pay for any information herein requested, nor is it liable for any costs incurred by the submitting firms.
2. Vendors whose proposals do not meet the minimum qualifications will be so notified. After evaluation of the proposals and approval by the IPERS, all vendors having submitted proposals will be notified of the successful vendor.
3. IPERS reserves the right to not hire or to defer the hiring of a vendor for these services.

D. PROPOSAL OBLIGATIONS

The contents of the proposal and any clarifications thereto submitted by the successful vendor shall become part of the contractual obligation and will be incorporated by reference into the ensuing Contract.

E. DISPOSITION OF PROPOSALS

All proposals become the property of IPERS.

F. COMPLIANCE WITH IPERS' ETHICS POLICY

Bidders must agree to comply with [IPERS' Ethics Policy](#). Pursuant to that policy, the successful bidder must not be involved in any relationships with IPERS' Key Employees or with any other party providing services to IPERS that would constitute a conflict of interest, as defined in the policy, with respect to the products and/or services to be provided under this RFP. Each Bidder must provide a positive statement in its proposal's **Appendix A** affirming either that it has no such conflicts of interest, or an IPERS disclosure statement disclosing potential conflicts and requesting approval in advance.

G. IOWA STATUTES AND RULES

The terms and conditions of this RFP and the resulting Contract shall be construed in accordance with the laws of Iowa. Whenever differences exist between federal and state statutes or regulations affecting this procurement, interpretation shall be in the direction of that which is most beneficial to the interests of the State of Iowa.

H. SIGNATURE OF VENDOR'S AGENT

The offer made by the proposal, and any clarifications to that proposal, shall be signed by an officer of the vendor or a designated agent empowered to bind the firm in a Contract.

I. IPERS CONTRACT SIGNATORY

IPERS' Chief Executive Officer

J. CONTRACT AWARD

IPERS reserves the right to award this Contract not necessarily to the firm with the lowest fee and cost proposal, but to the vendor that will provide the best match to the requirements of the RFP. The successful firm will be determined in accordance with the evaluation criteria defined by IPERS.

K. APPEALS

Filing an appeal. Any firm that filed a timely bid or proposal and that is aggrieved by an award made by IPERS may appeal the decision by filing a written notice of appeal with Chief Executive Officer, 7401 Register Drive, Des Moines, Iowa 50306, within five calendar days of the date of award, exclusive of Saturdays, Sundays and legal state holidays. IPERS must actually receive the notice of appeal within the specified time frame for it to be considered timely. The notice of appeal shall state the grounds upon which the firm challenges IPERS award.

Procedures for vendor appeal. The appeal will be treated as "other agency action" in accordance with Iowa Code chapter 17A and cases interpreting this Code chapter. The procedure for an appeal of "other agency action" is to allow the vendor an opportunity to be heard. To fulfill this obligation, the vendor has five calendar days from the date the notice of appeal was filed with IPERS to submit any written arguments and documents it wants considered related to the merits of the appeal. The aggrieved vendor may, or may not, be afforded an opportunity to discuss the merits of the appeal with the CEO, over the telephone or in person. The CEO will issue a final agency decision related to the appeal. The exclusive means for a vendor to seek further review of the final agency decision shall be covered by Iowa Code §17A.19.

L. EVALUATION OF PROPOSALS

An Evaluation Committee ("Committee") has been established to evaluate and score proposals received and to select the successful vendor(s). The Committee is composed of IPERS staff.

M. EVALUATION CRITERIA

Proposals will be evaluated using the following criteria:

1. Technical Specifications	30%
2. Project Management	40%
3. Examples & References	20%
4. Fees	10%

N. TIMETABLE

1. **March 3, 2020**—RFP ISSUED
2. **March 17, 2020**—INQUIRES—Inquires and requests for interpretation or clarification of the RFP from potential bidders will be accepted only in writing by e-mail or fax, and only if received no later than 4 p.m. Central time, March 17, 2020. Mail, e-mail or fax requests to:

Iowa Public Employees' Retirement System
Attn: Shawna Lode
7401 Register Drive
Des Moines, IA 50306
E-mail: shawna.lode@ipers.org
3. **March 20, 2020**—RESPONSES TO INQUIRIES—Responses to and addenda resulting from requests for interpretation shall be posted on the IPERS website by 4 p.m., Central time.
4. **April 3, 2020**—PROPOSALS DUE—Proposals must be received by 4 p.m. Central time.
5. **April 10, 2020** – FINALISTS NOTIFIED (Tentative)
6. **Week of April 20, 2020** – FINALIST PRESENTATIONS at IPERS (IPERS may consider presentations hosted via teleconference.) (Tentative)
7. **May 1, 2020** — ANNOUNCEMENT OF SELECTION — IPERS will notify all vendors that submitted a proposal of its selection, which shall be subject to successful contract negotiation with the selected vendor. (Tentative)
8. **June 1, 2020** – Contract with successful vendor is effective (Tentative)

O. THE RESULTING CONTRACT

The Contract shall be a combination of the specifications, terms and conditions of the RFP, any written clarifications or changes made to this RFP, the offer contained in the successful proposal and any additional contractual terms and conditions agreed to mutually and in writing by the parties.

P. TERM OF CONTRACT

The initial term of the contract for the selected vendor(s) shall be three (3) years and shall be eligible for up to a one three (3) year extension, subject to mutual agreement. However, the resulting contract will allow termination at IPERS' discretion, with or without cause, after thirty (30) days written notice to the vendor.

Q. PERFORMANCE-BASED FEES

Iowa Code §8.47 places a requirement on state agencies that service Contracts must contain a performance-based payment clause. The administrative rule, 11 Iowa Administrative Code 107.4, describes the acceptable types of performance-based payment clauses. An acceptable performance-based payment clause that all bidders must include in their responses to the RFP can place the entire payment for all deliverables in the Contract at risk, or selected deliverables at risk. For the purpose of illustration only, an example might be:

Contractor will provide the deliverable(s) specified in Part X, paragraph XX, by July 1, 202X. In the event that the deliverable(s) in Part X, paragraph XX, are not delivered by July 1, 202X, Contractor will forfeit [certain percentage of the invoice] [\$X amount] [will subtract \$XXXX/day until delivery is made to IPERS].

Each bidder must propose performance-based fees in its response to the RFP. IPERS encourages bidders to be creative. The Evaluation Committee will evaluate the performance-based fee proposals for each bidder. The performance-based fee proposals will be subject to final negotiations with the bidder selected pursuant to this RFP.

PART 3

QUESTIONNAIRE

The proposal must answer the following questions:

A. ORGANIZATION AND OWNERSHIP

1. Provide the following information:

Date of Response:	
Name of Vendor:	
Primary Contact Person:	
Title:	
Address:	
Telephone Number:	
E-mail Address:	

2. Describe the background and ownership of the vendor. Describe any material changes in organization structure or ownership that have occurred in the past five years.

- Year vendor was formed.
- The ownership structure. Indicate all entities that have an ownership stake in the firm (name and percentage).
- Affiliated companies or joint ventures.
- Recent or planned changes to the ownership or organization structure.
- Vendor's headquarters location.
- Location(s) where services to IPERS will be performed.

B. TECHNICAL SPECIFICATIONS

1. Describe your experience providing Drupal website development and system support on a managed services basis using technologies required by this RFP, including Drupal, LAMP stack (Linux, Apache, MySQL and PHP) and Amazon Web Services (AWS). Be specific as to which versions of the technologies with which you are experienced (example, Drupal versions 7 & 8).
2. Provide examples of three Drupal website development and system support engagements you have successfully completed. Your response should include but is not limited to:
 - a. A detailed explanation of the engagement
 - b. A detailed explanation of engagement scope and complexity
 - c. Contract value
3. Provide details of your support model. Your response may include but is not limited to:
 - a. Response time based on level of criticality (for example, one hour response time for critical applications)
 - b. Support window options (for example, business hours, 24/7, etc.)

4. Describe your competencies, expertise, and/or certifications in providing customer software security enhancements and remediation including, but not limited to:
 - a. Work with website scanning tools
 - b. Tracking, remediating and testing evolving security threats
 - c. Work with federal, state and industry security compliance controls and frameworks such as HIPAA, NIST 800-53, FedRAMP, IRS Pub 1075, and others.
5. Describe your code deployment process, including the deployment from one environment to another (i.e. DEV to TEST, TEST to PROD) and what automation processes are used for deployment.

C. PROJECT MANAGEMENT

1. From the discovery phase to launch, describe your process for developing websites. Describe your process for post-launch, ongoing website maintenance.
2. Describe your project management/project trafficking process.
3. List the people who would work on the IPERS account, including their job title (role), years of experience and any applicable certifications. Please note who will serve as the day-to-day contact for the account.
4. If your company is not located in the Des Moines area, explain how you will be accessible to IPERS staff.
5. Explain how you estimate costs and manage client budgets. What percent of your projects are completed under budget? What percent of your projects are completed over budget?
6. Explain how you use data and analytics to inform decisions about website development and maintenance. What analytics tool(s) do you use?
7. Four IPERS staff manage www.ipers.org in some capacity. Three IPERS staff have at least some knowledge of the Drupal platform. Explain your philosophy about working with clients who have some web development/maintenance expertise.

D. EXAMPLES & REFERENCES

1. Provide letters of reference from three current or previous clients knowledgeable of your performance in Drupal website development and system support. Please include contact information for each reference.
2. Have you worked for or do you currently work with a government client(s)? If so, please provide an example of work on behalf of a government client, and provide at least one reference from a government organization. (May or may not be a Drupal client.)
3. Provide an example of a Drupal site that you created for no more than \$100,000.
4. Explain a recent project you're most proud of and that demonstrates your creative and technical abilities. (May or may not be a Drupal site.)

E. Fees

1. Provide a list of all fees, including hourly fees.

Part 4

REQUIRED APPENDICES

REQUIRED APPENDICES – Letter evidencing vendor’s satisfaction of minimum qualifications, ability and willingness to provide required services and validating proposal for 180 days from date that the proposal is due. Letter must be signed by a person authorized to bind the vendor.

Part 5

IPERS Data Sharing Agreement

AGREEMENT made this ____ day of _____ 2019, between the Iowa Public Employees' Retirement System (hereafter referred to as IPERS), and the _____ (hereafter referred to as Vendor).

Background

1. The IPERS is a participating agency and, therefore, must comply with the State of Iowa Enterprise Data Stewardship Security Standard. In addition IPERS must comply with state and federal laws pertaining to the confidentiality, use and disclosure of personal information.
2. Vendor is not participating agency for the purposes of the State of Iowa Enterprise Data Stewardship Security Standard but must comply with state and federal laws pertaining to the confidentiality, use and disclosure of personal information.
3. This agreement outlines the terms, by which the IPERS and Vendor will share data, including confidential and/or personally identifiable information and also provides the terms under which parties shall maintain the confidentiality of the data to be shared.

Terms and Conditions

1. *Purpose of the Agreement.* IPERS has agreed to share member's confidential, personally identifiable information and other data to fill in variable data fields with Vendor, for the limited purpose for Vendor to accomplish tasks associated with the printing of IPERS forms.
2. *Data Sharing Procedure.* IPERS will provide Vendor with:
 - Data containing members confidential and personally identifiable information to be used to fill in variable data fields on IPERS forms for printing
 - Data will be supplied via ShareFile (ipers.sharefile.com)
3. *Confidentiality of Information.* Vendor agrees that access to the data will be restricted to authorized individuals.
4. *Data Security.* Vendor agrees to store the data securely.
 - Paper documents, DVDs, or other removable media containing data shall be stored in a locked cabinet, in a restricted area, accessible only to authorized individuals.
 - Workstations, laptops, or servers storing data shall be password protected using strong passwords.
 - Laptops containing data shall be encrypted using whole disk encryption (AES 256-bit or stronger).
5. *Data Destruction.* Vendor agrees that when the intended use of the data has been completed, it shall dispose of the information through the following destruction methods:
 - Wipe (e.g., scrub) hard drives, or any other electronic storage media, containing data using a DoD approved destruction method. Hard drives that cannot be wiped shall be physically destroyed by shredding;
 - Shred hard copy data such that the resulting residue prevents any recovery of the data file content.
6. *Redisclosure of Data.* Vendor agrees not to redisclose the data received from IPERS to a third party not covered by the agreement unless written permission by IPERS is received and redisclosure is not prohibited under applicable law.
7. *Data Breach.* Vendor shall notify IPERS, OCIO – Information Security Division and all affected individuals if the data is lost, stolen or disclosed to non-authorized individuals. Vendor shall accept responsibility for any events caused by the disclosure.
8. *Term.* This agreement is effective on the last date signed by a party and shall remain in effect until destruction or return of the data.

Name

Signature and Date

Name

Signature and Date