SB cera
San Bernardino County Employees' Retirement Association

Request for Proposals
Questions & Answers

RFP Title: PENSION ADMINISTRATION SYSTEM STRATEGY, EVALUATION AND PROCUREMENT CONSULTING SERVICES

SBCERA Responses Posted By: December 11, 2026

Vendor Proposal Submissions Due: January 5, 2027

SBCERA received the following questions regarding the RFP reference above. The questions and corresponding responses are provided below for the benefit of all prospective proposers.

1. **Contract Term (Agreement §6.1): Is the June 30, 2027 term date in the sample Agreement a placeholder, or the anticipated end date for the consulting services? Does SBCERA have an anticipated timeline for the assessment, PAS RFP development and procurement?**

   While SBCERA has not established a specific timeline, the intent is to move forward as soon as reasonably practicable. Respondents are encouraged to propose their earliest feasible schedule as part of their response.

2. **Travel Expenses (Agreement §10.1): The RFP and the sample Agreement appear to differ regarding travel expenses. Should travel expenses be included in the fee estimate, or may they be billed as incurred with SBCERA's prior approval?**

   Estimated travel expenses should be included in the proposal for budgeting purposes. Any travel must receive prior approval from SBCERA before expenses are incurred and should generally conform to SBCERA travel policy, e.g. coach class airfare.

3. **On-Site Expectations: How much on-site work does SBCERA expect (e.g., workshops, vendor demonstrations, Board presentations)? May the remaining work be performed remotely?**

   SBCERA anticipates that most work may be performed remotely. On-site participation may be requested for key activities, such as workshops, vendor demonstrations, or Board presentations, as determined by SBCERA. Respondents should identify anticipated on-site activities and include estimated travel expenses in their proposals. All travel must receive prior approval from SBCERA before expenses are incurred

4. **Data Conversion**: **Should the scope include a data conversion or data-quality readiness assessment, or is that out of scope?**

   Yes. The scope should include planning for a potential data conversion should one become necessary. This should include a high-level assessment of data quality, conversion readiness, project management requirements, scheduling, resource needs, and other considerations associated with a potential conversion effort. Detailed data mapping, cleansing, and actual conversion activities are not anticipated as part of this engagement.

   SBCERA has not determined whether these services would be performed by the selected consultant or procured separately. Respondents proposing to provide data conversion project management or implementation services should identify those services, associated deliverables, timelines, and costs as a separate, optional component of their proposal."

5. Cyber Insurance (Agreement §11.13): Is the $5M cyber insurance requirement negotiable?

It may be changeable but would require a discussion with SBCERA's Chief Counsel. We suggest that you make your proposed adjustments, if any, in your written response to the RFP.