

Tulare County Employees' Retirement Association (TCERA) Answers to questions regarding the Request for Proposal for Website Redesign, Development, Implementation and Hosting Additional Questions/Answers

May 19, 2020

1. What has motivated you to undertake a redesign of your website right now? [The website is aging and needs updated architecture. We are taking this opportunity to improve the technology/security of the site as well as give it a fresh look that provides a quality user experience for our members and the public.](#)
2. Have you established a project budget and timeline? [Please refer to the RFP for the timeline. There are no budget numbers to share at this time.](#)
3. Who would be the core TCERA group working with the chosen partner? [We will have one lead person in the office designated as the project manager. Additional staff members will be made available as necessary.](#)
4. Can you provide a list of current third-party systems you use (i.e. email, board agenda, event management & analytics software)? [Email is managed by the Tulare County Information and Communications Technology Division. Email hosting is not a part of this project. Board agendas are posted using Granicus technology. This may change in the near future as Tulare County is researching other solutions.](#)
5. How many staff currently update the site? Are you looking to provide more users the ability to manage content moving forward or do you see your current structures staying in place? [TCERA currently has three staff members that have access to update the site. This will likely remain the same for the foreseeable future.](#)
6. Do you currently have any public calculators available? [We no longer offer a public calculator. A benefits calculator is available to members who register for our member web \(My TCERA\) access. Development of a calculator is not included in this project.](#)
If so, do you have access to the code for those calculators? [n/a](#)
7. Do you anticipate any integration with your CPAS LOB system? [The site needs to provide a link to My TCERA that is clearly identified and visible on the home page of the site.](#)
8. It appears that you currently have a self-service portal available for members. Are members able to manage/change the following items: a. Update contact information [Yes – deferred and retired](#) b. Access financial documents (i.e. if they would like to apply for a loan). [Loans are not allowed from our plan. All members can access pdf versions of pension related documents.](#) c. Add/delete/change beneficiaries [No – beneficiary changes must be submitted on a TCERA beneficiary form.](#) d. Report a death [No.](#) e. Create an estimate [Yes – Active and deferred.](#) f. Secure messaging - [No](#) g. Submit

documents - No h. File for reciprocity – No i. Book appointments? Yes – all members for pre-scheduled events (seminars, group retirement sessions). The member must call or email for an individual appointment.

Functionality in the portal varies depending on the member's status in our system (e.g. Active, Deferred, or Retired). Active member interaction is limited because the records are synchronized with the employer records. Information is generally updated through the employer for active members. Deferred members and retired members have more functionality. I've noted above what functionality is available by membership type.

9. Which of the above items is a manual process for which the member would have to complete a form and mail/deliver to your location? [See answers in #8.](#)

10. If any of the items above are manual, we will want to add a search appliance that will index (search the content inside of) documents. If this is the case, are you ok investing in this to create a better member experience? [TCERA does not want the website to interact directly with member data.](#) The My TCERA portal will stand alone for that functionality.