9/18/2023



REQUEST FOR PROPOSAL

Member Experience Communication Platform

Cookie Jaranilla

Project Manager

626-564-6000

mecp@lacera.com

300 NORTH LAKE AVENUE, SUITE 650

PASADENA, CA 91101

**TABLE OF CONTENTS**

|  |  |
| --- | --- |
| 1. INTRODUCTION
 | 1 |
| 1. SCOPE OF SERVICES
 | 2 |
| 1. MINIMUM QUALIFICATIONS
 | 6 |
| 1. INSTRUCTIONS TO RESPONDENTS
 | 6 |
| 1. NOTICE TO RESPONDENTS REGARDING THE PUBLIC RECORDS ACT AND RALPH M. BROWN ACT
 | 10 |
| 1. DIVERSITY, EQUITY, AND INCLUSION
 |  |
| 1. NOTICE TO RESPONDENTS REGARDING LACERA DATA PROTECTION
 | 11 |
| 1. CONTRACT NEGOTIATIONS
 | 11 |
| 1. RESERVATIONS BY LACERA
 | 12 |
| **EXHIBITS LIST** |  |
| Exhibit A – Proposal Cover Page and Checklist |  |
| Exhibit B - Minimum Qualifications Certification |  |
| Exhibit C – LACERA MECP Requirements questionnaire |  |
| Exhibit D – Contract for Services |  |
| Exhibit E – IT Security Controls |  |
| Exhibit F – INTENT TO RESPOND |  |
| Exhibit G – Selection Criteria |  |
| Exhibit H – diversity, equity, and inclusion questionnaire |  |

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

REQUEST FOR PROPOSAL (RFP)

**Member experience communications platform**

**9/18/2023**

1. **Introduction**
	1. Purpose of Request

The Los Angeles County Employees Retirement Association (LACERA), a $73.6 billion public pension fund (as of June 30, 2023), is seeking proposals from qualified firms to replace its current AWS Connect contact center and implement and migrate to an enterprise cloud contact center solution.

* 1. Background Information

LACERA is a tax-qualified defined benefit public pension fund established to administer retirement, disability, and death benefits for the employees of the County of Los Angeles and other participating agencies pursuant to the County Employees Retirement Law of 1937 (CERL) (California Government Code Section 31450, et seq.), the California Public Employees’ Pension Reform Act of 2013 (PEPRA) (California Government Code Section 7522, et seq.), LACERA’s Bylaws and Board Policies, and other applicable California law. LACERA also administers the County’s medical and dental retiree health benefits program.

LACERA operates as an independent governmental entity separate and distinct from Los Angeles County and the other participating agencies. LACERA has approximately 168,110 members, including 96,539 active members and 71,571 retired members.

The Respondent(s) selected through this RFP process may be recommended to LACERA’s - Board of Retirement (BOR). The BOR has responsibility over the administration of pension and healthcare benefits and other fund administrative issues. The BOR comprises four Trustees elected by the general, safety, and retired members, four Trustees appointed by the County’s Board of Supervisors, and the sitting County Treasurer and Tax Collector as an ex officio Trustee. The BOR also has two alternate Trustees, one elected by safety members, and one elected by retired members.

The Boards and their trustees have fiduciary duties as defined in Article XVI, Section 17 of the California Constitution and CERL, with duties owed to the plan members and their beneficiaries taking precedence over any other duties.

LACERA is seeking a Member Experience Communications Platform with a proven, state-of-the-art, commercial-off-the-shelf solution with minimal modifications. LACERA’s goal is to gain efficiencies and update existing processes through a best- of- breed Enterprise Communications system, focusing on improving the timeliness, accuracy, consistency of information, and internal operations.

The new MECP system shall meet the following objectives:

* Replace the existing AWS Connect with a cloud based communications service that provides Omni-Channel Contact Center with native MS Teams certified integration.
* Implement skills-based routing; remote agents; multi-channel agents; voice and screen recording; place-in-queue estimated wait time and scheduled callback; IVR self-service/help; screen pops; priority routing; workforce optimization/management (including forecasting capability); customer feedback; voice authentication; real time voice analytics during calls (resulting in real time AI assisted calls), AI assisted chat capability integrated with email, IVR, and lacera.com; service requirement escalations, analytics and reporting.
* Complete the initial implementation of the platform by end of FY 2024, with subsequent phase with TBD implementation dates as we fully capitalize on all services sought.

In addition to the functionality identified above, LACERA is seeking a Proposer to provide professional services (e.g., best practices guidance, training, project management, implementation, integration, and report development) that will ensure a successful implementation in a timely and professional manner.

The full scope of work is detailed in the next section below.

For additional information about LACERA, please refer to LACERA's Annual Financial Report,

which is posted on the LACERA website, www.lacera.com, in the "Investments" section.

1. **SCOPE OF SERVICES**

LACERA is currently using the following telephony equipment and services. The current contact center, will be upgraded and/or replaced by the proposed solution, as part of this RFP:

* 1. Current UC
		1. Teams Phone
		2. Teams Rooms
		3. E911
		4. Voicemail
		5. Conferencing/Collaboration
		6. Auto Attendant and Queues
	2. Current Contact Center
		1. AWS Connect
		2. Callback
		3. Customer Feedback
		4. Audio Recording
	3. Sample Current Contact Center Summary Data
		1. LACERA Contact Center – Operational Profile
		2. # Locations 1
		3. # Contact Center Splits 3
		4. Spanish Queue
		5. Remote Agents Yes
		6. Logins ~260
		7. Active Agents ~80
		8. Total Annual ACD Calls ~233,120
		9. Daily Average ACD Calls ~940
		10. Average Handle Time ~13 minutes
		11. Hours of Operation 7:00-5:30 PST – Monday-Friday
1. **MINIMUM QUALIFICATIONS**

All respondents must clearly show and document in the proposal the following minimum qualifications:

* 1. The proposed solution must be based upon the proposer’s existing commercially available CCaaS and UCaaS product offerings. The solution will require minimal modifications/customization and will meet substantially all LACERA’s defined requirements, as identified in Exhibit C, LACERA Member Experience Communications Platform Requirements Questionnaire.
	2. Proposed solution must demonstrate compatibility and full integration with LACERA’s Microsoft Teams UCaaS.
	3. Proposer must have a minimum of (5) five years’ experience in successful implementation of their cloud hosted CCaaS and UCaaS solutions, and in successful migration from on premise to their cloud-based solutions, preferred experience with, but not limited to migration from Avaya on premise and AWS cloud solutions.
	4. Proposer must have completed, at a minimum, two fully operational system implementations of similar or larger size and scope, and at least an average of over 1,000 incoming calls per day to the contact center.
	5. Proposer must demonstrate strong relevant and successful experience in providing similar services/solutions to similar industry organizations, as evidenced by client qualifications and references. Proposer must provide at least 3 references for work completed with similar requirements as to those described in this RFP.
	6. Proposer must provide supporting evidence to substantiate that their overall solution is open, flexible, scalable, and portable.
	7. Proposer must complete this RFP’s Exhibit C, LACERA Member Experience Communications Platform Requirements Questionnaire and provide appropriate supplemental system information and documentation to demonstrate their software’s functionality and responsiveness.
	8. Proposer will be responsible for a turnkey solution of all components of the total solution.
	9. The Proposer Project Manager will be a key role and will be responsible for all interactions with solution team members for the design, delivery, and configuration implementation and testing. LACERA Project Manager works with the Proposer Project Manager and will be responsible for LACERA’s sign off of the delivered solution prior to implementation.
	10. Proposer will manage the proposer resources as a single LACERA delivery team and will provide dedicated (not shared) resources to perform the migration and implementation work.
	11. Proposer must possess an office or physical presence in the Southern California area or, alternatively, clearly demonstrate how they will have a sufficient local presence to serve and be readily accessible to LACERA both during the implementation project and for support post implementation.
	12. Proposer must affirm ability to work within the Southern California area, specifically at the LACERA offices at 300 N Lake Ave in the City of Pasadena. LACERA will not accommodate time or expenses for Proposer’s employees to travel or commute.
	13. Proposer must be able to provide and support both an UCaaS and a CCaaS solution and the stated requirements.
1. **INSTRUCTIONS TO RESPONDENTS**

The following table provides a tentative schedule of important dates and deadlines for this RFP. All dates are subject to modification by LACERA without notice.

1/26/ - 2/23

|  |  |
| --- | --- |
| **Event Description** | **Date/Time** |
| RFP release date | 11/06/2023 |
| Intent to Respond closing date | 11/27/2023 |
| Written questions from Respondents due date | 12/08/2023 |
| LACERA’s response to Respondents’ questions  | 12/15/2023 |
| Proposal due date | 01/12/2024 |
| Finalist Interviews (estimate) | 02/26/2024  |
| Vendor Recommendation to BOR (estimate) | 04/03/2024 |
| Selection Notification (estimate) | 04/03/2024 |
| Commencement of work | Upon contract execution |

* 1. Response Requirements and Formatting
		1. Respondents to this RFP must submit the completed proposal no later than **5:00 PM PDT** on December 8, 2023. Any proposal delivered after the proposal deadline will not be considered. Faxed transmissions are not acceptable. Completed proposals are to be emailed to the attention of (see also 4.2):

MECP RFP

Project Manager

LACERA

mecp@lacera.com

Send an electronic copy in PDF or Microsoft Word format via email. If the file is too large to email, it may be submitted on a USB flash drive.

RFP Registration Procedures:

1. Go to <https://lacera.cobblestone.software/gateway/SolicitationPublicDetails.aspx?rid=Labi6mRxRg6yM6pAQcrMgQ%3d%3d>
2. Create an Account to register for this RFP.
3. Enter your Company Information, User information then validate the account via the verification process.
4. Verify receipt of login information confirmation from Contract Insight Alerts.
5. Sign in to the LACERA RFP portal using the login information provided.
6. Navigate to Solicitations>Search All Solicitations.
7. Click on the View hyperlink for the MECP RFP.
8. On the left spine under Page Actions please click on Register as Respondent.
9. Please scroll down all the way to the bottom of the page under Response Status and change your response status to Interested in Responding to confirm intention to bid and click on Submit.
10. If your response status has changed, please navigate back to Response status and change and submit accordingly.

If Respondent requires any confidential information to be exempt from public disclosure, then submissions should also include one **electronic copy** marked “**REDACTED**”. The redacted copies should redact all material from the proposal that the respondent believes in good faith is exempt from disclosure under the California Public Records Act, (California Government Code §7920.000 et seq. the “Act”). Individual redactions should appear as blacked out material. Large sections, tables, or entire blank page(s) shall include the word “REDACTED” or “PROPRIETARY” inserted. Each respondent must indicate the basis for each redaction under the Act (defined below) with a citation to the code section and subsection relied upon. LACERA cannot guarantee that redacted information will not be publicly available. Please see the **Section 5** below “*Notice to Respondents Regarding the Public Records Act AND RALPH M. BROWN ACT*” for further information. An electronic copy of both the original and the redacted response in PDF format saved on separate DVDs, each labeled accordingly.

* + 1. Submittals shall be at least 10-point font, but no larger than 12-point font and page limit maximums (as indicated below) are to be complied with. Submittals shall address all RFP sections in the same order presented and be responsive to each section.
			1. Cover Letter. A cover letter (1 page) shall be signed by the individual(s) who is (are) authorized to bind the respondent contractually. The letter shall contain a statement to the effect that the respondent is not currently under investigation by any regulatory agency, state or federal, for any reason. The letter should identify your firm’s competitive advantage, the specific team that will be working on the LACERA account, and the reasons why the firm should be selected.
			2. Minimum Qualifications Certification. You must certify, by completing and signing EXHIBIT B, that your firm meets the minimum qualifications required.
			3. Table of Contents. The response must contain a Table of Contents that identifies the major sub-sections of the Questionnaire.
			4. Questionnaire. Provide your response to the enclosed Questionnaire (Exhibit C). Excluding the requested Exhibits, your response must not exceed [50] pages. Responses shall be in the prescribed format. The RFP and Exhibits have been made available for review and download via LACERA’s website (www.lacera.com) under the "Business Opportunities" section.
			5. Attachments. Optional material such as brochures or company information may be included as an attachment but will not be counted as responsive to this RFP and will not be used in scoring.
		2. All proposals made in response to this RFP must remain open and in effect for a period of not less than 180 days after the submission deadline. Responses to this RFP may be changed or withdrawn in writing if modifications are received prior to the submission deadline. Modification to or withdrawal of a proposal received after the submission deadline will not be considered. Responses received after the specified deadline may be considered for evaluation solely at the discretion of LACERA. In addition, LACERA reserves the right to request more information or clarifications from respondents, or to allow corrections of errors or omissions.
		3. Proposals not following these instructions or not including complete information as requested may result in a lower evaluation score or the proposal being declared non-responsive. For each part of the response, restate the RFP item immediately above the response. Pages in the proposal shall be numbered. When asked, please provide details and state all qualifications or exceptions. All information supplied should be concise and relevant to qualifications.
	1. Contacts with LACERA Personnel

Contacts with LACERA personnel about this RFP, and all inquiries and requests for information shall be directed to the Point of Contact identified below:

|  |
| --- |
| MECP RFPProject ManagerLACERA |
| Gateway Plaza300 North Lake Avenue, Suite 200Pasadena, CA 91101-4199 | Email: mecp@lacera.comPhone: 626-564-6000 |

* 1. Quiet Period

To ensure that prospective Respondents to this RFP have equal access to information about the RFP and communications related to the RFP are consistent and accurate so that the selection process is efficient and fair, a quiet period will be in effect from the date of issuance of this RFP until the selection of one or more respondents is completed and announced.

This RFP and other relevant information related to the RFP, including addenda, modifications, answers to questions, and other updates, will be available to the public at lacera.com. Each respondent to this RFP will be subject to the same terms and conditions and will receive the same information.

During the quiet period, respondents are not allowed to communicate with any LACERA staff member or Board member regarding this RFP except through the point of contact named herein. Respondents violating the quiet period may be disqualified at LACERA’s discretion.

Respondents who have existing relationships with LACERA must limit their communications between LACERA staff and Board members to the subject of the existing services provided by them.

* 1. Questions relating to this RFP

All questions, inquiries, and requests for additional information concerning this RFP should be received no later than 5:00 PM PDT, December 8, 2023, and should be emailed to mecp@lacera.com (see 4.2). All questions received and responses thereto will be posted on LACERA’s website (www.lacera.com) under the "Business Opportunities" section that relates to this RFP (https://www.lacera.com/who-we-are/business-opportunities) on or about 5:00 PM PDT, December 15, 2023.

Please note that during this evaluation process LACERA staff will not answer any questions related to the RFP except as set forth in the above paragraph. After December 15, 2023, if a question appears unclear to you, please state your interpretation of the question and answer it accordingly.

* 1. Evaluation Process

An evaluation committee consisting of LACERA staff members will review the RFP responses.  An initial screen and assessment will be conducted to both ensure that minimum qualifications are met and that proposals align with the objectives of the search.

Responses that meet minimum qualifications and are fit for purpose shall be subject to evaluation and scored on the following categories by the review committee:

1. Company Overview (20%)
2. Functions, Features and Capabilities (30%)
	1. Inbound Call Center
	2. Outbound Call Center
	3. Infrastructure and Architecture
	4. Omni Channel
	5. WFM and QM
	6. Unified Communications
	7. Administration and Reporting
3. Integration, Security, Support, and Implementation (25%)
4. Pricing (20%)
5. RFP Response Compliance (5%)

If advanced beyond round one of the evaluation phase, web-based and/or in-person interviews with LACERA may be scheduled. Finalists may be asked to make oral presentations to the Board of Retirement and the final selection will be made by the Board of Retirement.

* 1. Intent to Respond

If your firm chooses to respond to this RFP, please send the Intent to Respond, Exhibit F, via email (see 4.2), by 5:00 p.m. PDT, November 27, 2023. Failure to send your Intent to Respond may disqualify your firm from submitting a response to this RFP. Preferably, you can register and submit your intent to respond at our RFP portal <https://lacera.cobblestone.software/gateway/SolicitationPublicDetails.aspx?rid=Labi6mRxRg6yM6pAQcrMgQ%3d%3d>

1. **NOTICE TO RESPONDENTS REGARDING THE PUBLIC RECORDS ACT AND THE RALPH M. BROWN ACT**

The information submitted in response to this RFP will be subject to public disclosure pursuant to the California Public Records Act (California Government Code §7920.000, et. seq., the “Act”). The Act provides generally that all records relating to a public agency's business are open to public inspection and copying unless specifically exempted under one of several exemptions set forth in the Act. If a respondent believes that any portion of its proposal is exempt from public disclosure or discussion under the Act, the respondent must provide a full explanation and mark such portion “TRADE SECRETS,” “CONFIDENTIAL” or “PROPRIETARY,” and make it readily separable from the balance of the response. Proposals marked “TRADE SECRETS,” “CONFIDENTIAL” or “PROPRIETARY” in their entirety will not be honored, and LACERA will not deny public disclosure of all or any portion of proposals so marked.

By submitting a proposal with material marked “TRADE SECRETS,” “CONFIDENTIAL” or “PROPRIETARY,” a respondent represents it has a good faith belief that the material is exempt from disclosure under the Act; however, such designations will not necessarily be conclusive, and a respondent may be required to justify in writing why such material should not be disclosed by LACERA under the Act. Fee and pricing proposals are not considered “TRADE SECRET,” “CONFIDENTIAL” or “PROPRIETARY”.

If LACERA receives a request pursuant to the Act for materials that a respondent has marked “TRADE SECRET,” “CONFIDENTIAL” or “PROPRIETARY,” and if LACERA agrees that the material requested is not subject to disclosure under the Act, LACERA will deny disclosure of those materials. LACERA will not be held liable, however, for inadvertent disclosure of such materials, data, and information or for disclosure of such materials if deemed appropriate in LACERA’s sole discretion. LACERA retains the right to disclose all information provided by a respondent.

If LACERA denies public disclosure of any materials designated as “TRADE SECRETS,” “CONFIDENTIAL” or “PROPRIETARY”, the respondent agrees to reimburse LACERA for, and to indemnify, defend and hold harmless LACERA, its Boards, officers, fiduciaries, employees, and agents from and against:

1. All claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs, and expenses, including without limitation attorneys’ fees, expenses, and court costs of any nature whatsoever (collectively, Claims) arising from or relating to LACERA’s non-disclosure of any such designated portions of a proposal; and

2. All Claims arising from or relating to LACERA’s public disclosure of any such designated portions of a proposal if LACERA determines disclosure is deemed required by law, or if disclosure is ordered by a court of competent jurisdiction.

If LACERA staff recommends any respondent to the Boards for hiring, such recommendation, the reasons for the recommendation, and the relevant proposal(s) will appear on a publicly posted agenda and in supporting materials for public meetings of the Boards.

Nothing in this RFP requires LACERA to withhold any documents from production under the Act.

1. DIVERSITY, EQUITY, AND INCLUSION

LACERA values diversity, equity, and inclusion (“DEI”), and believes that effectively accessing and managing diverse talent leads to improved outcomes. LACERA takes a broad view of diversity, inclusive of varied backgrounds including, but not limited to, age, experience, race, ethnicity, sexual orientation, gender, gender identity, disability status, national origin, and culture. LACERA expects its business partners to respect and reflect LACERA’s value of DEI.

With respect to diversity, the response must include (see Exhibit H):

• description of diversity policies, practices, and procedures maintained by the firm regarding equal employment opportunity, including the recruitment, development, retention, and promotion of a diverse and inclusive workforce, non-discrimination based on gender, race, ethnicity, sexual orientation, age, disability status, veteran’s status, and other legally protected categories, and prohibition of sexual harassment in the workplace. If the respondent has written policies that address these matters, provide copies with the response to this RFP.

• the oversight, monitoring, and other compliance processes for implementation and enforcement of the firm’s diversity policies, practices, and procedures, including the name of the individual who is responsible for oversight of the firm’s method to measure the effectiveness of the policies, and conclusions as to effectiveness.

• any judicial, regulatory, or other legal finding, formal action, or claims related to equal employment opportunity, workplace discrimination, or sexual harassment during the past ten (10) years.

1. **NOTICE TO RESPONDENTS REGARDING LACERA DATA PROTECTION**

LACERA, its consultants, vendors, and contractors have a duty to protect all LACERA data, including without limitation, information related to members and beneficiaries, finances, systems, and operations.

The finalist selected through this procurement will have access to sensitive information protected by LACERA’s internal policies, State, and Federal law. In such a case, by submitting a proposal, respondent agrees to subject itself to certain contractual terms designed to protect such information, including without limitation cyber liability insurance – used when vendor might have access to or use of LACERA systems or information, SOC-2 reports – used when vendor might have access to or use of LACERA systems or information, systems penetration testing – used when vendor has access to LACERA systems or information and HIPAA Business Associate agreements – used when vendor has access to member personal health information. Respondents shall inform LACERA in their response if they have any limitations to agreeing to such terms. Respondents that do not make reservations shall lose their right to do so at the contracting phase.

1. **CONTRACT NEGOTIATIONS**

Upon Board approval, staff will enter contract negotiations with the approved Respondent. LACERA may end negotiations, at its sole discretion, if it believes a satisfactory agreement cannot be negotiated. LACERA reserves the right to award a contract based upon proposals received; you should not rely upon the opportunity to alter your proposal (e.g., services to be provided, fees, etc.) during contract negotiations.

The final contract must allow LACERA to terminate a) for its convenience, b) if funds are not appropriated for the services to be provided, and c) for default.

The general form of the contract LACERA intends to use for this engagement is attached as **Exhibit D**. By sending a proposal without comment on the general form contract, Respondent agrees to each term in the contract, and will not seek any modifications to the contract. LACERA has the right to change or negotiate contract terms different than those in Exhibit D in our sole discretion.

Respondents are required in their response to identify and explain any exception that it desires to take to any of the terms and conditions of this RFP. In addition, a respondent will be deemed to have agreed to each clause in the agreement (and not to seek inclusion of additional clauses), unless the respondent identifies an objection or inclusion, sets forth the basis for the objection or inclusion, and provides substitute language to make the clause acceptable to the respondent or to address an issue the respondent feels is not addressed by the agreement in its response to this RFP. If a satisfactory agreement cannot be negotiated with one or more of the firms, LACERA may, at its sole discretion, terminate such negotiations. LACERA, may then, at its option, initiate fee negotiations with another firm.

At LACERA’s discretion the term of the contract entered under this RFP may be for an initial period of up to five (5) years, beginning from the date of final execution. There may be two (2) one-year extensions under the same terms and conditions at LACERA’s option. All contracts may be terminated at LACERA’s convenience at any time.

1. **RESERVATIONS BY LACERA**

In addition to the other provisions of this RFP, LACERA reserves the right to:

* 1. Cancel or modify this RFP, in whole or in part, at any time.
	2. Make such investigation as it deems necessary to determine the respondent’s ability to furnish the required services, and the respondent agrees to furnish all such information for this purpose as LACERA may request.
	3. Reject the proposal of any respondent who has failed to comply with the requirements of this RFP, or who is not currently in a position to perform the contract, or who has previously failed to perform similar contracts properly, or in a timely manner or for any other reason in LACERA’s sole discretion.
	4. Waive irregularities to negotiate in any manner necessary to best serve the public interest, and to make a whole award, multiple awards, a partial award, or no award.
	5. Award a contract, if at all, to the firm which will provide the best match to the requirements of the RFP and the service needs of LACERA in LACERA’s sole discretion, which may not be the proposal offering the lowest fees or achieving the highest score.
	6. Request additional documentation or information from respondents. Requested information may vary by respondent. LACERA may ask questions of any respondent to seek clarification of a proposal or to ensure the respondent understands the scope of the work or other terms of the RFP.
	7. The right to choose to not enter into an agreement with any of the respondents to this RFP or negotiate for the services described in this RFP with a party that did not submit a proposal.
	8. Determine the extent, without limitation, to which the services of a successful respondent are or are not actually utilized.
	9. Defer selection of a winning bidder to a time of LACERA’s choosing.
	10. Consider information about a respondent in addition to the information submitted in the response or interview.
	11. Add terms and conditions during contract negotiations.
	12. The information that a respondent submits in response to this RFP becomes the exclusive property of LACERA. LACERA will not return any proposal or reimburse proposal preparation expenses.

The information you submit in response to this RFP will become the exclusive property of LACERA. Your response will not be returned to you, and LACERA will not reimburse you for response preparation expenses.

(*The rest of this page is left intentionally blank*)