

| Category  | Comments | Score   |         |         |         |         |         |         |         |            |
|---|----------|---------|---------|---------|---------|---------|---------|---------|---------|------------|
|   |          | Scorer1 | Scorer2 | Scorer3 | Scorer4 | Scorer5 | Scorer6 | Scorer7 | Scorer8 |            |
| <b>Part 1. General Evaluation of Proposed Project Manager and Team</b>  |          |         |         |         |         |         |         |         |         | <b>8.9</b> |
| Did the vendor have their proposed project team deliver the presentation and the demo (points are awarded on a zero (none of team) to ten (all of team) basis)  |          | 8       | 9       | 8       | 9       | 9       | 10      | 9       | 9       | <b>8.9</b> |
| Does the vendor's implementation team appear to understand the solution requirements as stated in the RFP?  |          | 9       | 9       | 9       | 10      | 9       | 8       | 9       | 8       | <b>8.9</b> |
| Is the team able to explain their proposed solution in the context of ERSRI requirements?   |          | 8       | 8       | 8       | 9       | 8       | 9       | 8       | 9       | <b>8.4</b> |
| Does the vendor staff attending the Bidder Presentation appear to be professional – i.e., able to explain material, conduct meeting, handle questions, working relationship, personable, etc?   |          | 9       | 10      | 9       | 9       | 9       | 10      | 9       | 9       | <b>9.3</b> |
| Does the vendor staff attending the Bidder Presentation appear to have a strong desire and excitement with regard to possibly being awarded this contract?  |          | 9       | 8       | 9       | 10      | 8       | 9       | 8       | 9       | <b>8.8</b> |
| Is the vendor-nominated Project Manager conversant with the proposed solution, with ERSRI' requirements relative to that solution, knowledgeable about Project Management? Does he or she appear to be someone with whom you can work for the next three years? |          | 7       | 9       | 10      | 10      | 9       | 10      | 8       | 9       | <b>9</b>   |
| <b>Part 2. Overall Scenario Evaluations</b>   |          |         |         |         |         |         |         |         |         | <b>8.5</b> |
| Did the vendor follow the scenarios as laid out in ERSRI' Product Demonstration Scenarios (see Part 3)?   |          | 9       | 8       | 9       | 9       | 8       | 9       | 8       | 9       | <b>8.6</b> |
| Did the vendor fully understand those scenarios and did the solution appear to address each one?  |          | 9       | 9       | 8       | 9       | 8       | 8       | 9       | 9       | <b>8.6</b> |
| Did the assigned project team do the demo – or was it "outsiders" or other non-project team members   |          | 8       | 10      | 9       | 10      | 10      | 10      | 9       | 9       | <b>9.4</b> |
| Did the vendor successfully complete each of the scenarios?   |          | 8       | 8       | 9       | 9       | 9       | 9       | 8       | 10      | <b>8.8</b> |
| Did the bidder show additional features and functions that enhanced the user experience or the overall solution?  |          | 7       | 8       | 7       | 9       | 8       | 9       | 8       | 9       | <b>8.1</b> |
| <b>Part 3. Actual Scenario Evaluation</b>   |          |         |         |         |         |         |         |         |         |            |

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|   |          | Scorer1 | Scorer2 | Scorer3 | Scorer4 | Scorer5 | Scorer6 | Scorer7 | Scorer8 |     |
| 1. Enrollment: addition of a new person to the database, including the capture of demographic info, employment info and account establishment; show how the system handles addition of members when information is incomplete; generation of automatic correspondence; scanning and indexing where appropriate; addition of a former member and a member transferring service from reciprocal agency.   |          | 9       | 9       | 8       | 9       | 9       | 8       | 8       | 9       | 8.6 |
| 2. Wage and Contribution Reporting: processing of one employer's wage and contribution reporting with at least ten employees to two different plans; members account should be identified both "prior to" and "after" posting. Demonstration to include various types of members, events, and specific information scenarios (see Appendix 1, page 4 for details).  |          | 10      | 9       | 9       | 10      | 9       | 9       | 7       | 8       | 8.9 |
| 3. Account Maintenance / Customer Relationship Functionality: applications ability to provide limited contact management functionality including calendaring, correspondence tracking, scheduling of to-do items, notes, histories and general account maintenance. Demonstration to include various scenarios to review, modify and update member information via various methods, share information with various parties, and manage correspondence to individuals and groups (see Appendix 1, page 5 for details). |          | 9       | 8       | 8       | 10      | 8       | 9       | 7       | 9       | 8.5 |
| 4. Benefit Estimate / Retirement Processing: applications ability to perform a retirement benefit calculation that includes all forms of benefits (single-life, joint and survivor, etc.); average wage calculations; various intermediary calculation results along the way; formal print-out of the results; and other related  |          | 8       | 7       | 9       | 9       | 8       | 6       | 7       | 9       | 7.9 |
| 5. Management / Roll-up Reporting: types of reporting provided in the solution including aggregate and individual performance information; summary reports to aid management in determining the state of the system without requiring significant system expertise to generate or interpret reports (i.e., no jargon).  |          | 8       | 8       | 8       | 8       | 8       | 9       |         | 9       | 8.3 |

