

Question	Response
<p>Can IMRF provide a complete inventory of the current custom functionality that must be retained in the new solution, including the pop-up ads and Member Learning Center functionality, along with any available business rules, dependencies, and documentation?</p>	<p>Bidders should review the public website to best understand its customer functionality. In addition, see document titled "Special Features Public Web" for a list and description of certain custom functionality.</p>
<p>Can IMRF provide a similar inventory for COMPASS, including any custom staff profile logic, personalization rules, workflow customizations, search customizations, and department-specific features that must be preserved? Would IMRF be open to providing limited read-only access to COMPASS for inspection, or alternatively screenshots, recordings, or documentation of key workflows and custom features?</p>	<p>Please see the document titled "Special Features COMPASS" for a list and description of certain custom functionality.</p>
<p>Should bidders assume strict functional equivalence at launch, or is IMRF open to replacing certain legacy implementations with modern Sitecore XM Cloud patterns where the business outcome and user experience are preserved?</p>	<p>IMRF requires functional equivalence at launch but is open to modern SiteCore AI patterns to achieve business outcome and user experience when new platform does not support legacy model.</p>
<p>Since Section 3.3.1 requires fixed cost for Phases I and II, may we include explicit assumptions and exclusions tied to that fixed price, especially for items such as search platform selection, forms replacement complexity, content cleanup decisions, and legacy custom application refactoring?</p>	<p>Yes, any exceptions to fixed cost need to be noted.</p>

<p>How should bidders assume responsibilities are divided among IMRF, Sitecore, the selected Solution Partner, and any hosting providers for environment setup, front-end hosting, networking, security configuration, and DevOps?</p>	<p>IMRF will assess Bidder's recommendations how they typically divide responsibilities with past clients.</p>
<p>Since both sites currently use Web Forms for Marketers, should bidders assume all existing forms will be migrated as part of Phases I and II? If so, can IMRF provide an inventory of current forms, routing rules, email notifications, approval logic, and any submission-handling requirements?</p>	<p>Yes, Bidders should assume Web Forms for Marketers forms will be migrated to an equivalent solution.</p>
<p>Can IMRF clarify whether we should assume full migration of all current pages, media, PDFs, Word documents, images, and miscellaneous files, or whether some content may be archived, excluded, or recreated manually as part of the project? For content that is unstructured or not suitable for automated migration, should bidders assume IMRF staff will handle manual migration, or should bidders include manual content migration services in scope?</p>	<p>For Phase I and Phase II ("lift, shift, and improve"), IMRF expects only changes necessary to rebuild the websites on the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required. Regarding the second question, if content must be migrated manually, Bidders should include manual content migration services in scope.</p>
<p>For Section 6.5, should bidders assume one final delta migration before launch, multiple scheduled delta migrations, or a formal content freeze period for each site?</p>	<p>It should be planned to have an initial migration of content, one delta prior to User Acceptance Testing, and one last delta when site goes live. IMRF will continue to make content changes since our public site is our way to communicate with our customers.</p>

<p>What acceptance criteria will IMRF use to confirm compliance? Should bidders assume automated testing only, or a combination of automated scans, manual testing, keyboard testing, assistive technology testing, and internal review?</p>	<p>IMRF will use a combination of automated, manual, keyboard and assistive technology testing to confirm compliance, and acceptance criteria.</p>
<p>The media library contains approximately 8,000 PDFs, 600 Word documents, and 7,000 images. Does accessibility remediation extend to these legacy assets as well, or only the website itself?</p>	<p>For Phase I and Phase II ("lift, shift, and improve"), IMRF expects only changes necessary to rebuild the websites on the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required.</p>
<p>Since Exhibit D notes that IMRF will continue using the current vendor for development until migration is complete, what level of cooperation should bidders assume from the incumbent vendor for documentation, code access, environment access, release coordination, defect resolution, and knowledge transfer?</p>	<p>Release coordination should not be necessary as IMRF is expected to freeze development. No major defects are expected to be migrated to Sitecore AI. IMRF is expecting selected Bidder to have extensive experience with Legacy Sitecore ASP.net Web Forms migration to Sitecore AI. Selected Bidder cannot expect existing vendor will do a knowledge transfer.</p>
<p>COMPASS currently uses on-premises Active Directory for staff authentication. Should bidders assume the current authentication model will continue, or should the proposed solution include a new target-state identity and SSO approach? Is multi-factor authentication required for COMPASS users?</p>	<p>COMPASS is already a SSO. It should remain accessible via the Network once user is authenticated by AD. IMRF is open to AD or Microsoft Entra ID. MFA access to COMPASS not required, but COMPASS content should not be available in DMZ and IP restrictions or other whitelisting should be applied.</p>

<p>Exhibit D requires that COMPASS content and endpoints are not externally accessible. Can IMRF clarify the current access model for staff and any preferred target-state access pattern for the new environment?</p>	<p>COMPASS is our intranet site. In order to access it, staff has to be connected to the network. Authentication is based on Active Directory. Staff can connect to Network on site or via VPN. Once connected to the network, staff can access COMPASS. Preferred access is to continue having access based on Active Directory - this is a SSO.</p>
<p>COMPASS has approximately 15 Sitecore workflows with email notifications and multi-step approvals. Should we assume these workflows and capabilities carry over one to one?</p>	<p>Yes, all COMPASS workflows should carry over to new site.</p>
<p>Should we assume Phase I and Phase II include only the visual and front-end changes required to support responsiveness and WCAG 2.1 AA compliance, or is a broader visual redesign expected as part of the lift, shift, and improve effort?</p>	<p>For Phase I and Phase II ("lift, shift, and improve"), IMRF expects only changes necessary to rebuild the websites on the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required.</p>
<p>Can you better confirm the structure of responses. 3.3 gives high-level paragraphs on what should go in each section, but the sections below are sometimes not mentioned in these paragraphs or are named differently. Therefore, we need clarity on specifically which sections should go into which package and if there is a desired sequence or order?</p>	<p>The Project Proposal, Section 3.3.1(1), must include narratives, charts, and related types of responses to all items in Sections 5 and 6. No cost is to be included in the Project Proposal. The Cost Proposal, Section 3.3.1(2) must include all costs linked to each phase in the Project Proposal (Phase I, II, III, IV). The Bidder must also include the payment schedules and change order processes defined in Section 3.3.4 and Section 3.3.5 of the Cost Proposal.</p>
<p>Do you have a standard warranty period you are looking to achieve, or are you looking for our standard or recommended warranty period?</p>	<p>For each go live (Phase I and Phase II), a year of warranty is required.</p>

<p>It states that Phase 1 needs to go live no later than Q1 2027, however it also states that the IMRF team is unavailable from January through March due to organizational activities. Should this then be interpreted as no later than the end of 2026?</p>	<p>Phase I should be implemented by 4/30/2027, and Phase II by 7/31/2027 or sooner, if possible. IMRF staff will be available for testing but this should not be the busiest period for the project.</p>
<p>Do you have expectations for the technical documentation to be provided?</p>	<p>Yes, all technical documentation should be provided as project deliverables.</p>
<p>For Phase III (roadmap), what level of strategic transformation versus incremental improvements is IMRF expecting?</p>	<p>During Phase III, the Bidder must deliver a multi-year roadmap of improvements for both websites. IMRF anticipates the roadmap will ultimately lead to a significant strategic transformation of our websites in order to serve our stakeholders. The roadmap could include a series of incremental improvements, or a single web redesign, resulting in strategic transformation. IMRF will also leverage internal UX expertise to define and validate these improvements in collaboration with the selected Bidder.</p>
<p>Among members, retirees/beneficiaries, employers, and staff, which audiences are the top priority for roadmap improvement over the next 2–3 years, and what are the most important jobs-to-be-done for each?</p>	<p>IMRF is actively conducting UX work, including member interview sessions, journey mapping, and analysis of call center and secure messaging data. Ongoing research insights will directly inform design decisions throughout project redesign phases, with clear guidance for incorporating findings into the delivery process.</p>
<p>Once the migration succeeds technically, what are the top 3 experience problems IMRF would still want the roadmap to address next?</p>	<p>IMRF will be assessing the complexity of member needs, and existing systems, through ongoing research efforts. This will be critical for informing and ensuring that experience decisions remain aligned with real user behavior and organizational priorities.</p>

<p>What research findings should we treat as established inputs to the roadmap, and what areas are still open questions that need further validation?</p>	<p>IMRF is actively conducting UX research, including member interview sessions, journey mapping, and analysis of call center and secure messaging data. These areas are being actively refined through ongoing research. IMRF's internal UX team will lead the definition and prioritization of these needs and integrate them into experience and roadmap decisions. IMRF is also conducting ongoing research that will inform design recommendations for site navigation and taxonomy.</p>
<p>For Phase III, which content areas, business owners, or publishing workflows create the most friction today, either for authors or for end users trying to find what they need?</p>	<p>Regarding end users, IMRF is actively conducting ongoing UX research, the insights will help identify key user content friction points within the site. In addition, the Bidder must facilitate sessions with various IMRF staff to identify other friction points. IMRF's internal UX team will lead user research synthesis, experience definition, and prioritization throughout the project lifecycle. Bidder will collaborate within this framework to support delivery and execution. Ongoing discovery and validation of user needs will be conducted and directed by IMRF. Bidders may support research execution where requested but should not assume ownership of user research direction or prioritization.</p>
<p>Can IMRF clarify the decision-making structure for project approvals, scope changes, and prioritization for the 3 phases?</p>	<p>The project will be managed on a daily basis. Please see section 4.2 in RFP.</p>
<p>Can you specify the custom functionality? With descriptions of each? Or can a demo or video walkthrough be provided?</p>	<p>See documents titled "Special Features Public Web" and "Special Features COMPASS" for lists and descriptions of certain custom functionality.</p>
<p>Can a list of features that the Member Learning Center supports be provided?</p>	<p>See document titled "Special Features Public Web" for more details about the Member Learning Center.</p>

<p>To enable responsiveness and accessibility, will the selected vendor be providing UX designs? Or is IMRF or a 3rd party delivering UX?</p>	<p>The IMRF in-house designer will work in partnership with the selected Bidder. The Bidder is responsible for collaborating with the in-house UX Designer to provide sufficient UX design to meet the project's requirements. Scope and priorities will evolve iteratively as research progresses. Bidders are expected to operate within this framework and support delivery against IMRF-defined UX priorities.</p>
<p>Can a list of features that the Intranet supports be supplied?</p>	<p>See document titled "Special Features Public Web" for more details.</p>
<p>Can the existing user experience reviews already conducted be supplied?</p>	<p>IMRF will provide accessibility findings to the Bidder team. Current summary is available on RFP Exhibit D, pages 4 through 6. The selected Bidder will receive updates when the project begins.</p>
<p>What timeline does IMRF have envisioned for their internal team to gradually take over the solution?</p>	<p>IMRF expects backend and frontend users to be sufficiently trained so that they can begin administering the new sites once both are live.</p>
<p>Is there a preferred or mandatory warranty period?</p>	<p>For each go live, a year of warranty is required.</p>
<p>Are there any AI policies that IMRF has in place? As far as are allowed and are not allowed?</p>	<p>Yes, IMRF does have an Artificial Intelligence policy which is for internal use only. Please refer to the use of AI on page 7 of Exhibit D on RFP for the evaluation of the risk of the proposed AI tool by the Bidder.</p>
<p>Will IMRF provide a vetted list of known accessibility defects to be remediated in Phase I and II, or should the vendor perform a full accessibility discovery?</p>	<p>We expect the selected Bidder to also perform a full accessibility discovery. IMRF will share the scope and list of findings from the initial accessibility audits conducted on the public website.</p>
<p>Is remediation of existing PDFs, Word documents, and media in scope, or limited to page templates and UI layers?</p>	<p>For the Phase I and Phase II ("lift, shift, and improve"), IMRF expects only remediation necessary to rebuild the websites on the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required.</p>

<p>During Phases I and II, IMRF noted that content updates will continue on the existing platforms.</p> <p>Can IMRF confirm whether it prefers a defined content freeze window prior to launch, or a continuous delta?sync approach through final acceptance?</p>	<p>It should be planned to have an initial migration of content, one delta prior to User Acceptance Testing, and one last delta when site goes live. IMRF will continue to make content changes since our public site is our way to communicate with our customers.</p>
<p>Is the expectation that all existing content migrates 1:1, or is content pruning and consolidation expected? If expected, how much content should we assume will be consolidated or adjusted?</p>	<p>For Phase I and Phase II ("lift, shift, and improve"), IMRF expects migrating existing content as is unless changes are necessary to rebuild the websites on the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required.</p>
<p>Who is responsible for rewriting outdated, unclear, or duplicative content uncovered during migration?</p>	<p>For Phase I and Phase II ("lift, shift, and improve"), IMRF expects migrating existing content as is unless changes are necessary to rebuild the websites on the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required.</p>
<p>Should the vendor propose content improvements or only implement IMRF-authored changes?</p>	<p>For the Phase I and Phase II ("lift, shift, and improve"), IMRF expects only content improvements necessary to rebuild the websites on the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required.</p>
<p>Are large numbers of PDFs expected to remain PDFs, or is there interest in converting high-value documents into web-native pages?</p>	<p>For the Phase I and Phase II ("lift, shift, and improve"), IMRF expects only conversion necessary to rebuild the websites on the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required.</p>
<p>How frequently does IMRF expect content changes during migration windows?</p>	<p>IMRF makes multiple changes to our public website and COMPASS on a daily basis.</p>

<p>As part of the migration to Sitecore AI, the frontend will be rebuilt using a modern headless architecture (e.g., React/Next.js), and accessibility improvements (WCAG 2.1 AA), responsive behavior, and performance enhancements are explicitly in scope for Phase I-II.</p> <p>Can IMRF clarify its expectations regarding incremental user experience and visual updates that may naturally result from this rebuild, such as improved layout consistency, spacing, typography, visuals and contrast, interaction patterns, and accessible components while maintaining the current brand standards and overall information architecture?</p>	<p>For the Phase I and Phase II ("lift, shift, and improve"), IMRF expects only incremental user experience and visual updates required to rebuild the websites on the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior, while maintaining brand standards and overall information architecture. No other changes are required. The selected Bidder is expected to collaborate closely with IMRF's internal UX team to ensure adherence to established standards, and to support the creation of a cohesive, maintainable design system.</p>
<p>Does IMRF currently have a formal design system, brand system, or UI library beyond accessibility color guidance? If so, should it be strictly adhered to or can it be refined during this engagement?</p>	<p>IMRF has a brand standards guide, as well as a UX Designer and Graphic Designer who can provide additional guidance. For the Phase I and Phase II "lift, shift, and improve," IMRF expects colors to remain the same unless changes are required to rebuild the websites in the new platform, comply with ADA (WCAG 2.1 AA) requirements, or implement responsive behavior. No other changes are required. The selected Bidder is expected to collaborate closely with IMRF's internal UX team to ensure adherence to established standards, and to support the creation of a cohesive, maintainable design system. IMRF will leverage internal UX expertise to define, guide, and validate these improvements, working in close collaboration with the selected Bidder to ensure alignment between design intent and technical implementation.</p>
<p>Is there any expectation of visual refinement (typography, spacing, component consistency) in Phase I, or should the current look and feel be preserved exactly?</p>	<p>For the Phase I and Phase II ("lift, shift, and improve"), IMRF expects only visual updates necessary to rebuild the websites on the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required. The selected Bidder is expected to collaborate closely with IMRF's internal UX team to ensure adherence to established standards.</p>

<p>Are we expected to reduce the number of templates and components during Phase I/II, or strictly reimplement existing ones as-is?</p>	<p>For the Phase I and Phase II ("lift, shift, and improve"), IMRF expects only changes to templates and components necessary to rebuild the websites on the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required.</p>
<p>For planning purposes, can IMRF clarify expectations around the division of responsibilities between IMRF staff and the selected vendor for activities such as accessibility validation, content QA, and user acceptance testing?</p>	<p>Accessibility validation, Content QA, and User Acceptance Testing will be performed by different users throughout the organization. Selected Bidder is responsible for ensuring the product meets the accessibility requirements as indicated in RFP, as well as responsible for the integrity of the content that is intended to be moved from one platform to another.</p>
<p>Is the current site taxonomy and navigation required to remain unchanged in Phases I and II?</p>	<p>For the Phase I and Phase II ("lift, shift, and improve"), IMRF expects only changes necessary to rebuild the websites in the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required.</p>
<p>Are we allowed to consolidate, rename, or reorder navigation labels where accessibility or clarity issues exist?</p>	<p>For the Phase I and Phase II ("lift, shift, and improve"), IMRF expects only changes necessary to rebuild the websites in the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required. IMRF is currently conducting ongoing research that will inform design recommendations for site navigation and taxonomy, and will review and consider recommendations from selected Bidder. We need to make sure this part is approached as a partnership with IMRF. The selected Bidder is expected to collaborate closely with IMRF's internal UX team to ensure adherence to established standards - and to leverage insights gathered from member research to inform site taxonomy and navigation.</p>
<p>How is Staff Profile personalization currently implemented within COMPASS? Specifically, is it driven by layout, component, or rendering logic, or by custom rules and conditions using Sitecore's personalization engine?</p>	<p>Custom Search Component adds assigned Teams to User's Teams Menu. Please refer to "Special Features COMPASS" document for each person's version of COMPASS on page 5.</p>

<p>Since Sitecore AI does not natively send emails, can the solution integrate with IMRF's existing email relay for outbound email delivery?</p>	<p>IMRF uses Office 365 Exchange Online. Various options are open, but App Registration and Microsoft Graph API could be leveraged to send emails.</p>
<p>Can you provide more detail on the current Google Analytics implementation? Does it include custom event tracking, data layer integration, or other non-standard configurations?</p>	<p>We have custom Event Tracking for File Downloads. Other configurations are standard.</p>
<p>Is it acceptable for the partner to implement code using partner-provided development environments, or are IMRF-issued VMs or VDIs required?</p>	<p>Yes, this is acceptable and not required for Bidder development to be on IMRF issued VM.</p>
<p>As part of the lift, shift, and improve effort, legacy ASP.NET Web Forms custom functionality will be reimplemented for a headless architecture on Sitecore AI.</p> <p>Does IMRF have any custom features that are considered candidates for deprecation or functional simplification during Phase I-II, or should Bidders assume full functional equivalence as a baseline?</p>	<p>There are specific custom integration, features and components that are no longer in use and IMRF will inform Selected Bidder that these items do not need to be candidates in the lift and shift and are obsolete. Regarding other used custom features IMRF desires a functional equivalent.</p>

<p>IMRF has noted user feedback indicated dissatisfaction with historical faceted search experiences and a preference for simpler search interactions.</p> <p>For Phase I and II, should Bidders prioritize functional parity with existing search capabilities, with modernization deferred to Phase III, or is IMRF open to introducing a revised search experience earlier provided performance and risk requirements are met?</p>	<p>For the Phase I and Phase II ("lift, shift, and improve"), IMRF expects only changes necessary to rebuild the websites in the new platform, comply with ADA (WCAG 2.1 AA) requirements, and implement responsive behavior. No other changes are required.</p>
<p>Should the roadmap be tactical (features, components, timelines) or strategic (themes, principles, phased investment areas)?</p>	<p>IMRF expects the roadmap to contain both tactical and strategic recommendations. In producing this roadmap, we expect the Bidder to draw on its experience in similar engagements with other clients.</p>
<p>Are you looking for redesign wireframes/comps/prototypes to accompany the roadmap?</p>	<p>IMRF expects wireframes/comps/prototypes to accompany the roadmap. In producing the roadmap, we expect the Bidder to draw on its experience in similar engagements with other clients. And, to provide recommendations on Sitecore UI and component functionality available within the new platform. IMRF has a UX designer and Graphic Designer who can help drive the design process in collaboration with support from the Bidder. The selected Bidder is expected to collaborate closely with IMRF's internal UX team to ensure adherence to established standards and to support the creation of a cohesive, maintainable design system. And, leverage insights gathered from member research to inform overall site redesign direction.</p>

<p>IMRF has indicated openness to frontend hosting platforms such as Vercel or Netlify for the Sitecore AI headless frontend.</p> <p>For planning and cost modeling purposes, does IMRF have a preferred frontend hosting provider, or should bidders propose a primary recommendation (e.g., Vercel) with supported alternatives?</p>	<p>The Sitecore AI licensing model includes the cost of front end hosting provider. Anything the Bidder has to do as part of the implementation for setting up these services will need to be identified in the cost.</p>
<p>Given that Web Forms for Marketers is not compatible with Sitecore AI, and forms will need to be rebuilt, does IMRF have any constraints or preferences regarding:</p> <p>Sitecore Forms vs. third-party form solutions Hosting and email delivery for rebuilt forms Analytics or reporting requirements tied to forms</p> <p>Or should bidders propose a recommended approach aligned with IMRF's security and accessibility standards?</p>	<p>Bidder should propose a recommended approach.</p>
<p>Given the significant architectural changes from XP 9.x to Sitecore AI, including the SaaS delivery model and differences in extensibility, certain XP customizations may not be supported in Sitecore AI such as event handlers, pipelines, or custom ribbons.</p> <p>Is IMRF agreeable to a joint review of the current solution to identify functionality that cannot be recreated in Sitecore AI and align on acceptable alternative approaches?</p>	<p>IMRF is agreeable to reviewing alternative approaches when XP components cannot be recreated in SiteCore AI.</p>

Who is responsible for planning and executing load and performance testing, IMRF or the selected partner? If the partner, do you have services we can use to run testing (e.g. Azure Load Testing or similar)?	Selected Bidder is responsible for executing load testing and providing results to IMRF. Selected Bidder is expected to standup and use tools they are familiar with.
Do you expect training to be delivered to all end users, or do you prefer a train-the-trainer model?	Training should be delivered to all content authors and back end developers.
Is the vendor required to mail written proposal to the mentioned person? Or an electronic copy submitted over email should suffice?	Electronic copy submitted via email to danielmartinez-procurement@imrf.org is acceptable and preferred.