



800 COMMERCE DR

OAK BROOK IL 60523-2196

www.imrf.org

Legal

Request for Proposal (Goods & Services)

Project Name: RingEX/RingCX - Horizon Promotions

Date: January 22, 2026

1. The Illinois Municipal Retirement Fund (IMRF) is inviting bids for the products and/or services described in the general specifications, set forth below. Bids should be submitted by written form by email, facsimile, registered mail, certified mail or hand delivery.
2. It is anticipated that the bids will be opened immediately after the submission time and date, and the bids awarded to the successful bidder as indicated in the General Instructions. IMRF reserves the right to award the bid to other than the low (high) bidder or to reject all bids.

About IMRF

IMRF is a multiple employer agent public employee retirement system providing retirement, survivor, death, and disability benefits to employees of units of local government in Illinois. Created by the Illinois General Assembly, IMRF is governed by the Illinois Pension Code (40 ILCS 5/1-101 et seq.) and is a defined benefit pension plan.

IMRF provides benefits to eligible employees of approximately 3,027 units of government. IMRF has approximately 175,224 active members, 148,128 inactive members, and 151,568 retirees and beneficiaries. We manage assets of approximately \$45 billion and are governed by an eight-member Board of Trustees elected by the employers, active members, and annuitants.

The Board of Trustees makes all benefit decisions and has rule-making authority. Decisions of the Board of Trustees are subject to judicial review under Article III of the Code of Civil Procedure (735 ILCS 3-101 et seq.). IMRF is not an agency of the State of Illinois and is not subject to the Illinois Administrative Procedure Act. IMRF's latest Comprehensive Annual Financial Report and other information about IMRF may be obtained from the website at www.imrf.org.

IMRF's Mission

To efficiently and impartially develop, implement, and administer programs that provide income protection to members and their beneficiaries on behalf of participating employers, in a prudent manner.

IMRF's Vision

To provide the highest quality retirement services to our members, their beneficiaries, and employers.

IMRF's Values

Guiding us to REAACH our Mission, Vision, and Goals

Respect

Empathy

Accountability

Accuracy

Courage

Honesty

Baldridge Criteria for Performance Excellence & Illinois Performance Excellence

In our journey towards excellence, IMRF has adopted the Baldridge Criteria framework in order to help us develop and maintain continuous improvement efforts. The Baldridge Criteria outline a set of qualities high-performing organizations possess, in the following seven categories:

1. Leadership
2. Strategy
3. Customers
4. Measurement, analysis, and Improvement of Organizational Performance
5. Workforce
6. Operations
7. Results

Illinois Performance Excellence (ILPEX/IMEC) is a non-profit organization that seeks to help organizations improve their performance by utilizing the Baldridge Criteria for Performance Excellence and aligning their processes to become more efficient and sustainable.

IMRF was proud to be the recipient of the ILPEX Gold Award (representing achievement of excellence) in 2017.

In November 2019 IMRF staff received notice that IMRF is a proud recipient of the Malcolm Baldridge National Quality Award, the first public pension fund in the nation to receive this prestigious award.

Customer Service Principles

In March 2012, IMRF adopted our organizational Customer Service Principles as part of Modernization. The Customer Service Principles apply to everything we do at IMRF. They shape our approach to serving our customers and should guide all day-to-day IMRF operations.

To provide great customer service, IMRF will:

- Establish, manage and communicate expectations, and then follow up.
- Supply timely and accurate information.
- Be simple, fast, and easy for the customer.
- Offer a variety of options.
- Have a global view of the customer.
- Empower staff to resolve problems.

Vendor Expectations

IMRF's Vision and Values and Customer Service Principles help us achieve our goals. We expect our vendors to assist us in achieving these goals by:

- Following our Values.
- Respecting our Customer Service Principles with on-time services and quality products.
- Complying with our ethical bidding process starting with the initial vendor contact through fulfilling contract / order requirements.
- Maintaining a professional work ethic.

Purchasing Diversity Policy

The goal of the IMRF Purchasing Diversity Policy is to promote utilization of businesses owned by minorities, females, and persons with a disability in procurement activities. IMRF encourages its vendors to review the policy, which can be found at www.imrf.org/en/about-imrf/procurement/procurement-diversity-policy.

Code of Conduct Compliance Policy

The IMRF Code of Conduct requires all employees to observe the highest standards of business and personal ethics in the conduct of their duties and responsibilities. IMRF also expects its vendors to comply with our Code and to report violations or suspected violations in accordance with this Code of Conduct Compliance Policy.

Reports of violations or suspected violations can be made via our independent third party provider, Global Compliance Services. If desired, a vendor can submit the report anonymously, via phone or web. IMRF must comply with the Illinois Freedom of Information Act (5 ILCS 140/1 et seq.

General Instructions

Written bids are required by IMRF for *RingEX/RingCX Horizon Promotions* as described in the sections below.

The bids should be submitted to IMRF on or before the close of business at 3:30 CDT on **February 12, 2026**.

Bids MUST include the bid specification cost sheet and a completed Verification of "Minority Owned Business", "Disabled Owned Business" Or "Woman Owned Business" Status (Exhibit B).

1. Submit to:
Daniel Martinez
Illinois Municipal Retirement Fund
800 Commerce Drive
Oak Brook, IL 60523-2196
630-368-5366
Fax: 630-706-4233
Email: danielmartinez-procurement@imrf.org
2. The bid, to be awarded by March 13, 2026, will be confirmed by a purchase order issued to the successful bidder.
3. The bid will be awarded based on the overall bid; however, prices should be shown for each line item.
4. Equipment must be new and fully eligible for manufacturer's warranty.
5. Deliveries might have to be broken down. F.O.B. inside delivery, 800 Commerce Drive, Oak Brook, IL 60523. Freight should be included in the unit price. Inside delivery to IMRF. Pallets must be broken down.
6. IMRF must comply with the Illinois Freedom of Information Act (5 ILCS 140/1 et seq.) IMRF cannot represent or guarantee that any information submitted in response to this Invitation for Bids will be confidential. If IMRF receives a request for any document submitted in response to the Invitation for Bids, IMRF's sole responsibility will be to notify respondent of a request for such document to allow the respondent to seek protection from disclosure in a court of competent jurisdiction. No documentation will be provided under FOIA until the contract has been awarded.
7. IMRF is exempt from State and Local sales and use taxes.
8. IMRF is considered an "instrumentality of Illinois local government." IMRF is also a registered participant in the State of Illinois Joint Purchasing Program; our registration number is L1074.
9. IMRF has adopted a Diversity Procurement Policy, a copy of which is available from the IMRF Purchasing Coordinator and on the IMRF website (www.imrf.org). The bidder acknowledges receipt of a copy of said policy by signing and submitting a bid sheet to IMRF.
10. The bid shall constitute a binding offer to sell the above-noted product(s) to IMRF and may not be withdrawn once the Board of Trustee of IMRF has awarded the contract to the successful bidder.
11. The bid must be submitted on the IMRF Bid Sheet, which is hereby made an integral part of this document. Include all terms and conditions so the Bid Sheet is a signable contract.
12. Printing vendors must be pre-qualified through the Purchasing Department, before they are eligible to submit a bid. For inquiries, contact Daniel Martinez.
13. IMRF may terminate any bid award, upon thirty (30) days written notice to the successful bidder.
14. Questions concerning these bid documents or the IMRF bid process shall be addressed solely to the IMRF Procurement Specialist, Daniel Martinez (contact information on previous page). IMRF reserves the right to disqualify any bid should any other IMRF staff member be contacted during the bid process without the express written authorization of Mr. Martinez.



Illinois Municipal Retirement Fund

Project Title: RingEX/RingCX
Horizon Promotions Request for Proposal (RFP)

Location: 800 Commerce Dr, Oak Brook, IL

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Business Case

This project enhances the Illinois Municipal Retirement Fund's (IMRF) vision of providing the highest quality retirement services to our members, their beneficiaries, and employers.

SCOPE: The intent of this effort is to expand on the existing **RingEX/RingCX** configuration by promoting the Development (DEV) setup to three (3) other Horizon environments (UAT, MNT, and PRD). In addition, IMRF would like to replace existing Avaya desk phones with Poly desk phones. These phones will register directly to **RingEX/RingCX** via our Internet Service Provider (data) circuit. This will eliminate the need for the PSTN circuit. In-scope and out-of-scope items will be outlined in the Statement of Work (SOW) later in this document.

This effort is currently estimated to be completed by Q1 2027; however, the project timeline may be impacted by other factors, such as vendor delivery dates, scheduled inspections, stakeholder approvals, staff availability, and/or other IMRF priorities. Proper planning should be instituted to protect the timeline wherever possible.

This document will outline various aspects associated with this effort.

Statement of Work (SOW)

The following outlines the details related to this effort to integrate and test **Ring Central RingEX/RingCX** with three IMRF environments: User Acceptance Testing (UAT), Maintenance (MNT), and Production (PRD). At a high level, the primary objective is to replace our entire on-premises telephony systems with the **RingCentral RingEX** and **RingCX** cloud solution.

Requirements

The installed solution should be capable of accomplishing the following when integrating with our Horizon environments:

- Toll-Free Inbound Calling
 - o Ability for callers to reach Member (MBR) Services agent accounts
 - o Ability for callers to reach Employer (ER) Services agent accounts
 - o Generate a Unique Call Identification (UCID) to distinguish calls received from members, employers, and/or their beneficiaries
 - o Captures pertinent Contact Center call details such as start/end times, duration, launch times, and Automatic Number Identifier (ANI)
 - o Ability to configure messages for various scenarios, such as a call greeting, hot topic, holiday schedule, after-hours, severe weather, and other custom scenarios (i.e. emergencies, meetings)
 - o Provide Music on hold (MOH) for queued callers
 - o Ability to configure call flows that route callers based on their preferences (i.e. opted in or opted out for call surveys)
 - o Ability to route callers to voicemail boxes when there are no representatives available
 - o Ability to route calls based on agent skills
 - o Ability for the system to be administered by qualified and authorized IMRF staff
- Automated Telephone System with IVR
 - o Will follow a similar call flow as IMRF's existing approved IVR design.
 - o Includes ability for Speech Recognition
 - o Ability to integrate with and query against IMRF's custom Customer Relationship Management (CRM) solution (Horizon) via several Microsoft products (Dynamics CRM, SQL Databases)
 - o Ability to authenticate callers by Member Identification (MID) number, Employer ID number, and other Personally Identifiable Information (PII)
 - o Ability to upload IMRF-generated audio files for each prompt
 - o Ability to provide differing self-service options based on the Member Status (Active, Inactive, or Retiree) or if the caller is a Former Employee
 - o Self-service options for the main menu will say (or pressing):
 - Form Status (1)
 - Request a Form (2)
 - Payments issued (3)
 - Claim Status (4)
 - Payments Received (5)
 - Account Info (6) - *(if Member is not a Retiree)*
 - Financial Verification Letter (7)
 - Repeat (#)

- Representative (0)
- Form Status
 - Ability to query a custom API for the past 30 days and relay a status for any of the following forms that include a status of received:
 - Refund application
 - Direct Deposit form
 - Tax Withholding form
 - Retirement application
 - Beneficiary form
 - Disability application
 - Other
 - Notifies the member if there are no open or recent forms submissions
 - Transfers caller to an agent if the form is not compliant
- Request a Form
 - Ability to transmit document requests to Horizon for transmission via either paper or electronic format for the following document types by saying (or pressing):
 - Refund application (1)
 - Retirement package (2)
 - Beneficiary form (3)
 - Direct Deposit form (4)
 - Tax Withholding form (5)
 - Something else (6)
 - Repeat (#)
 - Main menu (9)
 - Representative (0)
- Payments Issued
 - Ability to query a custom API for the past 30 days and relay whether or not a payment was processed recently
 - If payment was processed, it will relay the amount and issued date
- Claim Status
 - Ability to query a custom API for the past 30 days and relay whether or not a claim was processed recently
 - There will be 4 claim types with 3 claim statuses
 - Claim for refund of regular contributions
 - Claim for refund of voluntary contributions
 - Retirement claim
 - Disability claim
 - Claim statuses: In progress, needs additional information, or complete
- Payments Received
 - Ability to query a custom API for the past 30 days and relay whether or not a payment was received recently
 - If payment was received, it will relay the amount and reception date
- Account information
 - Only accounts with an ACTIVE or INACTIVE Member Status are offered account information in the main menu

- Account information includes the following information pulled from the applicable Horizon DEV API:
 - Pension Amount
 - Voluntary Additional Contribution Balance
 - Voluntary Additional Contribution Principal
 - Voluntary Additional Contribution Interest
 - Credited Service Years
 - Credited Service Months
 - Financial Verification Letter
 - Ability to transmit this special document request to Horizon for transmission via either paper or electronic format
 - These letters are processed via a separate workflow than form requests
- Text-to-Speech
 - Ability to upload generated voice prompts in one or more standard audio formats (.WAV, .MP3, etc.)
- Callback Assist (CBA)
 - Ability for callers to receive offers for the system to call them back rather than wait on hold during busy periods
 - Ability to adjust the CBA availability as needed, including based on Estimated Wait Time (EWT)
 - Ability to provide a second offer after a predetermined amount of hold time
 - Ability to call the agent first
 - Ability to set transfer groups based on whether the member is opted in or opted out of a call survey
 - Ability to re-enter calls into the CBA queue at a higher priority if RONA occurs
 - Scheduled callbacks are not required
- Web Callback
 - Ability for callers to submit a callback request via the web (for potential future expansion)
- Omnichannel
 - Upon call pickup by an agent, facilitates a screenpop to the authenticated MBR/ER profile within the Horizon Admin portal via a designated Universal Resource Locator (URL) based on Horizon environment (UAT, MNT, and PRD).
 - Ability to add additional channels such as SMS, web chat, and email in the future
- Call and Screen Recording
 - Records voice and agent screen video of MBR and ER test calls
 - Records voice and agent screen video on-demand
 - Ability to query historical recordings for management analysis as needed
- Call Survey
 - Ability to provide an end of call survey using differing scales for certain questions (i.e. 0-5, 0-10).
 - Ability for a caller to opt out of call survey
- Reporting
 - Ability to generate daily, weekly, monthly, and annual reports using historical call data (including total created, total delivered, total established, total abandoned, total RONA, average handling times)

- Ability to provide real-time call handling statistical reports (via web-based wallboard, dashboard, or equivalent)
- Ability to generate and export CSVs to be integrated with the Horizon solution for custom reports
- Ability to generate call survey reports for differing times (day, week, month, quarter, year)
- Ability to configure automated reports to be emailed to a defined list of users
- Reports must mask any PII information
- Hardware
 - Install, configure, and test Poly phones for on-site access

Additional requirements include:

- Scheduling and coordinating a kickoff meeting with applicable stakeholders
- Attending weekly sync meetings through completion of this effort (approximately 12 months)
- Provide support for three (3) User Acceptance Testing sessions to validate configurations
- Provide a minimum of six (6) Knowledge Transfer (KT) sessions for IMRF staff in differing occupation levels.
 - Management (2)
 - End-to-end demonstration and Historical reporting
 - System Administrator (2)
 - To train system administration tasks
 - Contact Center Users (2)
 - Train-the-Trainer (T3)
 - End user training, if needed

In-scope

The following items are considered in-scope for this effort:

- Recommending improvements or change requests (subject to IMRF approval)
- Technical document generation to ensure proper API endpoint integration
- Recommending changes to IMRF Infrastructure such as switches, routers, load balancer, and/or firewall (subject to multiple reviews and IMRF approval/execution)
- Recommending configuration changes to the Horizon DEV components only (i.e. databases, application programming) (subject to multiple reviews and IMRF approvals)
- Training document generation to aid in the proper use of **RingEX** and **RingCX** components by IMRF's highly skilled workforce
- Additional subscription purchases (subject to IMRF review and approval)

Out-of-scope

The following items will not be considered for this effort:

- Any changes to other Horizon environments not specified here.
- After-hours/weekend work unless absolutely necessary (subject to IMRF approval)
- Additional third-party products or services that are considered custom, customizable, or are not compatible with **RingEX/RingCX** out-of-the-box (OOB) or of which separate support must be

purchased in order to maintain. The focus of this effort is the **RingEX** and **RingCX** applications only.

Change Control Board (CCB) Approval

The IMRF Change Control Board (CCB) meets regularly to review all upcoming changes that will impact the various active technology infrastructure environments. This helps the organization mitigate potential risks to on-going IMRF operations by limiting changes to only those that are necessary. **RingEX/RingCX** will provide a critical communications capability to IMRF and its stakeholders and, thus, any maintenance or changes to it once live will require review and CCB approval prior to execution of these changes.

Test Plan

Testing will include several telephony-based areas (IVR, CBA, skill-based routing, recording, survey, and analytical reports). The tables outlined in this section are *crucial* in establishing the needed configuration(s) of applicable **RingEX** and **RingCX** areas. At least one (1) User Acceptance Testing (UAT) will be performed prior to the completion of each Horizon environment (1 for UAT, 1 for MNT, and 1 for PRD). The success or failure of these tests will aid IMRF leadership in determining whether the configuration is set up properly prior to moving on to the next.

Here are some other considerations:

- Testing should be as robust as possible and mimic regular day-to-day operations to the best extent possible.
- Uploaded voice prompts (.WAV Files) should be using the latest phrase list (verbiage) reviewed and approved by IMRF Contact Center management.
- All Employer Services and unauthenticated Member Services calls should receive a call survey at the end of the call once the agent hangs up.
- Authenticated Member Services calls may or may not receive a survey based on whether the caller has opted in or not.
- There should be a total of 6 transfer groups configured for the DEV call flows:
 - Member (Survey)
 - Member (Non-Survey)
 - Member (CBA Survey)
 - Member (CBA Non-Survey)
 - Employer (Survey)
 - Employer (CBA Survey)
- The Callback Assist (CBA) availability schedules should be as follows (subject to change based on IMRF business needs):
 - Employer Services
 - Mon-Fri – CBA offers are available from 7:30am-3pm Central Time
 - Mon-Fri – Callbacks in queue can be processed from 7:30am-5:00pm Central Time
 - Scheduled callbacks are never available.
 - Member Services
 - Mon-Fri – CBA offers are available from 7:30am-3pm Central Time
 - Mon-Fri – Callbacks in queue can be processed from 7:30am-5:00pm Central Time
 - Scheduled callbacks are never available.
- **RingCX** Workforce Management (WFM) – The system should provide an omnichannel WFM software solution that is scalable and allows for expansion to other channels (i.e. SMS, chat, email) in the future.
 - The WFM should also provide the ability to configure wallboards to monitor real-time statistics for Employer and Member Services queues.
- Historical reporting – The completed solution should provide Contact Center management with historical reports based on a variety of intervals (i.e. daily, weekly, monthly). The reports should include pertinent agent and queue information such as averages, totals, and AUX times to name a few.
- Data retention for all voice recordings is 6 months, screen recordings is 1 month.

- Test results should be noted and communicated to the assigned IMRF Project Manager for communication to applicable stakeholders.

Employer Services Testing

The following table outlines each system or application to be tested for the Contact Center per environment and by whom:

Test #	Employer Services Test Description	Pass / Fail	Assigned Resource
1.	<p>IVR (ER SVC) – Upon dialing the Employer Services DEV test number a greeting should play and the employer representative is asked to enter their five (5) digit Employer number.</p> <p>If there is a match, a thank you message should relay and result in a transfer to an Employer Services agent.</p> <p>If there is no match, a message stating that we could not find that employer number should play and then repeat the question. A 3rd failure should result in a transfer to an agent.</p>		Infrastructure (Telecom) Contact Center (Employer Services Agent)
2.	IVR (ER SVC) – All transfers to an agent play the disclosure message that “your call may be monitored or recorded for quality assurance”.		Infrastructure (Telecom) Contact Center (Employer Services Agent)
3.	<p>RingCX (ER SVC) – Prior to entering a hold queue, the system should run checks against the following, in this order:</p> <ul style="list-style-type: none"> • Hot Topic • IMRF Holiday Schedule • After Hours • Severe Weather • Weather Exception • Emergency • Meeting • Staffed agents available <ul style="list-style-type: none"> ◦ If this value is at 0, then the caller should be directed to the appropriate Employer Services mailbox. • EWT > 120 seconds <ul style="list-style-type: none"> ◦ If yes, then a CBA offer is made if within the schedule parameters. 		Infrastructure (Telecom) Contact Center (Employer Services Agent)

4.	<p>CBA (ER SVC) – Hold queues with an estimated wait time (EWT) longer than 2 minutes should result with a CBA offer to the caller.</p> <p>After a description of IMRF's callback policy, the caller should be provided an option to request a callback by pressing 1 or continue to hold by pressing 2.</p>		Infrastructure (Telecom) Contact Center (Employer)
5.	<p>CBA (ER SVC) – If the offer is accepted, the CBA should ask the caller for their name. It should then repeat their recorded name and ask them to confirm if correct by pressing 1 or include the option to re-record their name by pressing 2.</p>		Infrastructure (Telecom) Contact Center (Employer)
6.	<p>CBA (ER SVC) – The CBA should relay the number the caller is coming from and ask to confirm if it is the best number to reach the caller at by pressing 1 or if they prefer to leave another number, then press 2 to enter another number.</p> <p>If the call does not pass calling rules as set under the RingCX's Global Settings, the caller should be informed that we are unable to call them back at that number. After 3 failed tries, the caller should be sent to the hold queue.</p>		Infrastructure (Telecom) Contact Center (Employer)
7.	<p>CBA (ER SVC) – A duplicate request menu should be set to check if the caller already has a pending callback. If it can be cancelled (and not already in progress), then they should have the option to cancel by pressing 1 or to continue to wait for their callback, they can press 2.</p> <p>*Current CBA settings only allow cancellations for <i>scheduled</i> callbacks; however, these are not enabled as of the writing of this project plan. We will need to confirm if RingCX allows for the cancellation of <i>immediate</i> callbacks.</p>		Infrastructure (Telecom) Contact Center (Employer)
8.	<p>CBA (ER SVC) – When processing a callback, the CBA should call the agent first. It should relay the customer's phone number provided and the name recording before placing the agent on hold as it places an outbound call to the customer.</p> <p>*If the callback fails due to an error, no answer, or busy tone, then only 2 retries are to be configured.</p>		Infrastructure (Telecom) Contact Center (Employer)

9.	<p>RingEX (ER SVC) – While in the hold queue, the caller should hear a Music On Hold (MOH) recording as well as any pre-recorded messages as designated by Contact Center management for Employer Services calls.</p> <p>*If the caller remains on hold for longer than 480 seconds (8 minutes) but less than 1,500 seconds (25 minutes), then a 2nd CBA offer is made.</p>		Infrastructure (Telecom) Contact Center (Employer Services Agent)
10.	<p>RingCX WFM (ER SVC) – Upon receipt of a call, the agent's WFM client should be configurable to set a “screenpop” to a URL designated to tie the call's UCID to the business CRM data.</p> <p>This screenpop should automatically navigate the agent to the Horizon profile associated with the Employer ID entered by the caller.</p>		Infrastructure (Telecom) Contact Center (Employer Services Agent)
11.	<p>RingEX Call Recording (ER SVC) – The system should automatically begin to record the call as well as the agent's screen upon the agent answering.</p>		Infrastructure (Telecom) Contact Center (Employer Services Agent)
12.	<p>RingCX Call Recording (ER SVC) – The system should provide the ability for on-demand call and screen recording.</p>		Infrastructure (Telecom) Contact Center (Employer Services Agent)
13.	<p>Survey (ER SVC) – Upon completion of all Employer calls, the caller should be directed to complete a call survey. The survey questions will match the same format as the latest version available in Production during set up.</p>		Infrastructure (Telecom) Contact Center (Employer Services Agent)

Member Services Testing

The following table outlines each system or application to be tested per environment and by whom:

Test #	Member Services Test Description	Pass / Fail	Assigned Resource
1.	<p>IVR (MBR SVC) – Upon dialing the Member Services DEV test number a greeting should play. The caller can then be authenticated using the following authentication paths (need 3 identifiers to match):</p> <ul style="list-style-type: none"> • MemberNbr + SSN4 + DOB • Member Nbr + ANI match + (SSN4 or DOB) <p>*No other authentication methods are allowed. If the member can access with only 2 of the above identifiers, then this test is considered a fail. 3 failed attempts should result in a transfer to an agent.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
2.	IVR (MBR SVC) – Place an unauthenticated call and attempt to reach a representative by pressing 0 or by saying “Representative”.		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
3.	IVR (MBR SVC) – All transfers to an agent play the disclosure message that “your call may be monitored or recorded for quality assurance”.		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
4.	<p>IVR (MBR SVC) – Self-service main menu for non-retiree should contain the following options:</p> <ul style="list-style-type: none"> • “Form status” or press 1 • “Request a form” or press 2 • “Payments issued” or press 3 • “Claim Status” or press 4 • “Payments received” or press 5 • <i>If API20_MemberStatus IS NOT RETIREE</i> <ul style="list-style-type: none"> ◦ “Account Info” or press 6 • “Financial verification letter or press 7 • “Repeat” or press # • “Representative” or press 0 		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)

5.	<p>IVR (MBR SVC) – Self-service main menu for a retiree should only contain the following options:</p> <ul style="list-style-type: none"> • “Form status” or press 1 • “Request a form” or press 2 • “Payments issued” or press 3 • “Claim Status” or press 4 • “Payments received” or press 5 • “Financial verification letter or press 7 • “Repeat” or press # • “Representative” or press 0 		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
6.	<p>IVR (MBR SVC) – Form Status submenu – The form status should be available for the following forms submitted within the past 30 days.</p> <ul style="list-style-type: none"> • Refund application • Direct deposit • Tax withholding • Retirement application • Beneficiary form • Disability application • Other <p>If no forms have been submitted within 30 days, then a message stating that there are no open or recent form submissions should play.</p> <p>A wrap menu should provide the ability to say “repeat” or press #, “main menu” or press 1, or “representative” or press 0. If anything else is played, then a message stating “I didn’t understand that” and a repeat of the wrap menu options should pursue.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)

7.	<p>IVR (MBR SVC) – Form Request submenu – The following forms can be requested for delivery via traditional mail (paper) or electronic transmission to the caller's IMRF Member Access account:</p> <ul style="list-style-type: none"> • “Refund” or press 1 • “Retirement” or press 2 • “Beneficiary” or press 3 • “Direct Deposit” or press 4 • “Tax Withholding” or press 5 • “Something Else” or press 6 • “Repeat” or press # • “Main menu” or press 9 • “Representative” or press 0 <p>The member should confirm the transmission method and receive confirmation once that is complete.</p> <p>If the caller does not confirm submission of their request, then they are provided with the option to speak to a representative.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
8.	<p>IVR (MBR SVC) – Payments Issued submenu – The payments issued should be available with the following information if the issued date is within the past 30 days.</p> <ul style="list-style-type: none"> • Payment Amount • Issued Date • If more than 1 payment: <ul style="list-style-type: none"> ◦ Amount and Issued Date for each additional payment should play chronologically. <p>If no payments have been processed within the last 30 days, then a message stating that we have not processed any payments recently should play.</p> <p>A wrap menu should provide the ability to say “repeat” or press #, “main menu” or press 1, or “representative” or press 0. If anything else is played, then a message stating “I didn’t understand that” and a repeat of the wrap menu options should pursue.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)

9.	<p>IVR (MBR SVC) – Claim Status submenu – The claim status should be available for the following claim types with a start date within the past 30 days.</p> <ul style="list-style-type: none"> • Refund Regular • Refund Voluntary • Retirement • Disability <p>Claim Status Options:</p> <ul style="list-style-type: none"> • Pending • Need info • Completed <p>If no open or recent claims have been processed within the last 30 days, then a message stating that there are no open or recent claims should play for the caller.</p> <p>A wrap menu should provide the ability to say “repeat” or press #, “main menu” or press 1, or “representative” or press 0. If anything else is played, then a message stating “I didn’t understand that” and a repeat of the wrap menu options should pursue.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
10.	<p>IVR (MBR SVC) – Payments Received submenu – The payments received should be available with the following information if the reception date is within the past 30 days.</p> <ul style="list-style-type: none"> • Payment Amount • Reception Date • If more than 1 payment: <ul style="list-style-type: none"> ◦ Amount and Reception Date for each additional payment should play chronologically. <p>If no payments have been received within the last 30 days, then a message stating that we have not received any payments recently should play.</p> <p>A wrap menu should provide the ability to say “repeat” or press #, “main menu” or press 1, or “representative” or press 0. If anything else is played, then a message stating “I didn’t understand that” and a repeat of the wrap menu options should pursue.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)

11.	<p>IVR (MBR SVC) – Account Info submenu – The account information is provided to the IVR via an API to get the annual information summary. It includes the following information:</p> <ul style="list-style-type: none"> • Pension Amount (as of December 31st of the previous year) • Voluntary Additional Contribution Balance (as of December 31st of the previous year) • Voluntary Additional Contribution Principal • Voluntary Additional Contribution Interest • Service Credit Years using the integer to the left of the decimal for creditedService to relay the proper number of years. • Service Credit Months using the following integers to the right of the decimal for creditedService to relay the proper number of months: <ul style="list-style-type: none"> ○ 0 months = 0.000 ○ 1 months = 0.083 ○ 2 months = 0.167 ○ 3 months = 0.250 ○ 4 months = 0.333 ○ 5 months = 0.417 ○ 6 months = 0.500 ○ 7 months = 0.583 ○ 8 months = 0.667 ○ 9 months = 0.750 ○ 10 months = 0.833 ○ 11 months = 0.917 <p>*Only ACTIVE and INACTIVE MemberStatus are offered Account Info on the Main Menu.</p> <p>A wrap menu should provide the ability to say “repeat” or press #, “main menu” or press 1, or “representative” or press 0. If anything else is played, then a message stating “I didn’t understand that” and a repeat of the wrap menu options should pursue.</p> <p>If there is a failure due to no data, it should result in a transfer to an agent.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
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12.	<p>RingCX (MBR SVC) – Prior to entering a hold queue, the system should run checks against the following, in this order:</p> <ul style="list-style-type: none"> • Hot Topic • IMRF Holiday Schedule • After Hours • Severe Weather • Weather Exception • Emergency • Meeting • Staffed agents available <ul style="list-style-type: none"> ◦ If this value is at 0, then the caller should be directed to the appropriate Member Services voicemail box. • EWT > 120 seconds <ul style="list-style-type: none"> ◦ If yes, then a CBA offer is made if within the schedule parameters. 		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
13.	<p>CBA (MBR SVC) – Hold queues with an estimated wait time (EWT) longer than 2 minutes should result with a CBA offer to the caller.</p> <p>After a description of IMRF's callback policy, the caller should be provided an option to request a callback by pressing 1 or continue to hold by pressing 2.</p> <p>MBR SVC CBA Offers should be tested for callers that have opted in and opted out of a survey to ensure the calls are being transferred appropriately.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
14.	<p>CBA (MBR SVC) – The CBA should ask for their name. It should then repeat their recorded name and ask them to confirm if correct by pressing 1 or include the option to re-record their name by pressing 2.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
15.	<p>CBA (MBR SVC) – The CBA should relay the number the caller is coming from and ask to confirm if it is the best number to reach the caller at by pressing 1 or if they prefer to leave another number, then press 2 to enter another number.</p> <p>If the call does not pass calling rules as set under the RingCX's Global Settings, the caller should be informed that we are unable to call them back at that number.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)

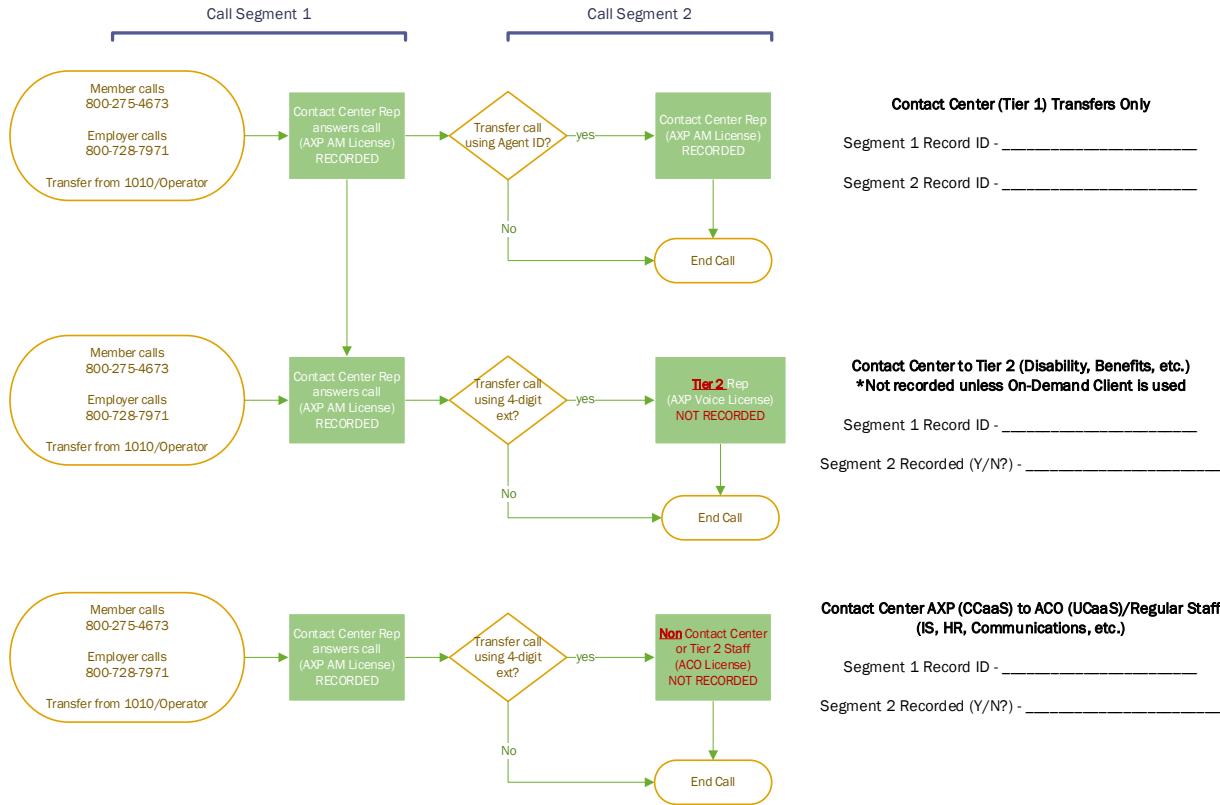
	After 3 failed tries, the caller should be sent to the hold queue.		
16.	<p>CBA (MBR SVC) – A duplicate request menu should be set to check if the caller already has a pending callback. If it can be cancelled (and not already in progress), then they should have the option to cancel by pressing 1 or to continue to wait for their callback, they can press 2.</p> <p>*Current CBA settings only allow cancellations for <i>scheduled</i> callbacks; however, these are not enabled as of the writing of this project plan. We will need to confirm if RingCX allows for the cancellation of <i>immediate</i> callbacks.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
17.	<p>CBA (MBR SVC) – When processing a callback, the CBA should call the agent first. It should relay the customer's phone number provided and the name recording before placing the agent on hold as it places an outbound call to the customer.</p> <p>*If the callback fails due to an error, no answer, or busy tone, then only 2 retries are to be configured.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
18.	<p>RingCX (MBR SVC) – While in the hold queue, the caller should hear a Music On Hold (MOH) recording as well as any pre-recorded messages as designated by Contact Center management for Member Services calls.</p> <p>*If the caller remains on hold for longer than 480 seconds (8 minutes) but less than 1,500 seconds (25 minutes), then a 2nd CBA offer is made.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
19.	<p>RingCX WFM (MBR SVC) – Upon receipt of a call, the agent's WFM client should be configurable to set a "screenpop" to a URL designated to tie the call's UCID to the business CRM data.</p> <p>This screenpop should automatically navigate the agent to the Horizon profile associated with the Member ID entered by the caller.</p> <p>A similar test should be done for an unauthenticated caller to confirm that the screenpop automatically navigates the agent to the Horizon Admin portal.</p>		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)

20.	RingCX Call Recording (MBR SVC) – The system should automatically begin to record the call as well as the agent's screen upon the agent answering.		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
21.	RingCX Call Recording (MBR SVC) – The system should provide the ability for on-demand call and screen recording.		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
22.	Survey (MBR SVC) – Upon completion of an authenticated, survey opted-in caller, the agents hang up and the caller is directed to a call survey. The survey questions will match the same format as the latest version available in Production during set up. A similar result should occur with an unauthenticated caller as they should be transferred to a call survey.		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)
23.	Survey (MBR SVC) – Upon completion of an authenticated, survey opted-out caller, the agents hang up and the call hangs up. The caller should not hear the call survey if they are opted out.		Infrastructure (Telecom) Contact Center (Sr. Member Services Analyst)

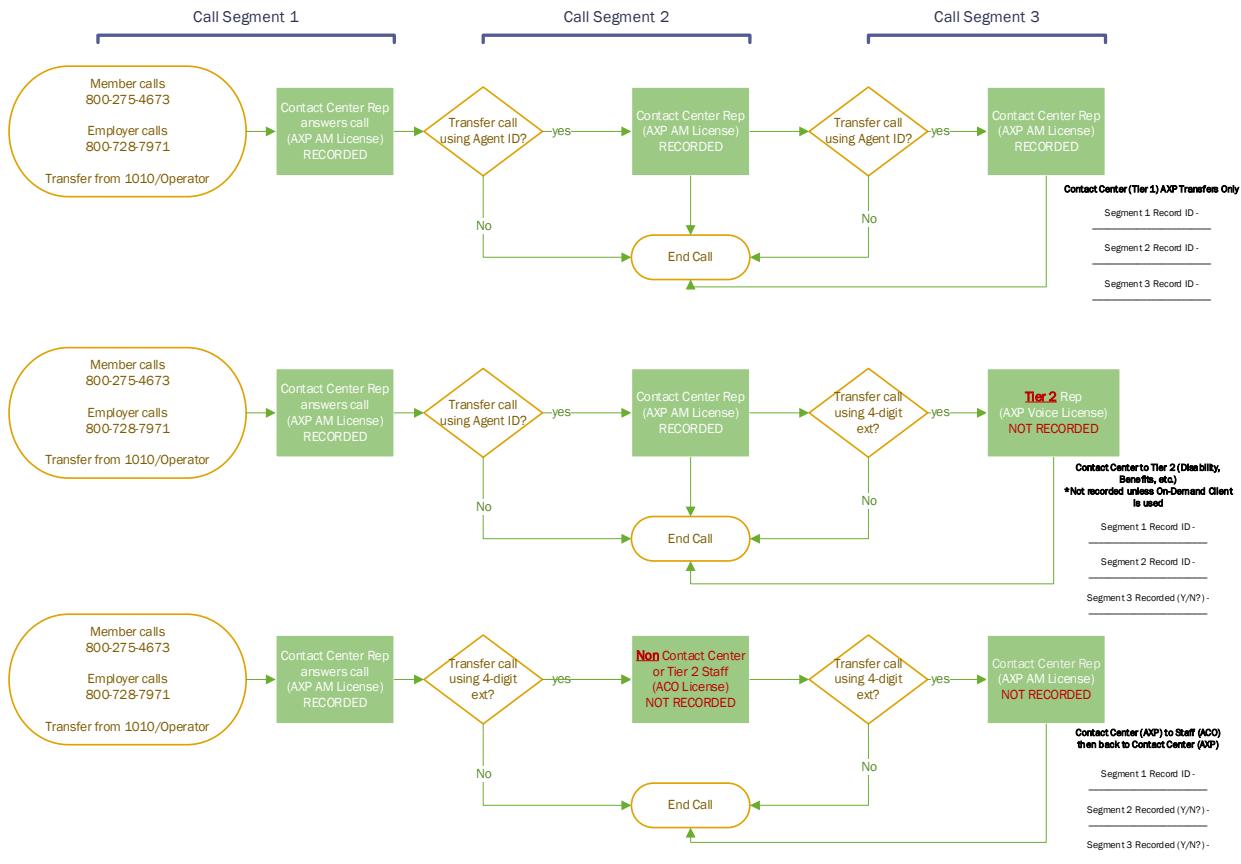
Call Recording Testing

The following pages outlines further details for testing related to the call recording solution:

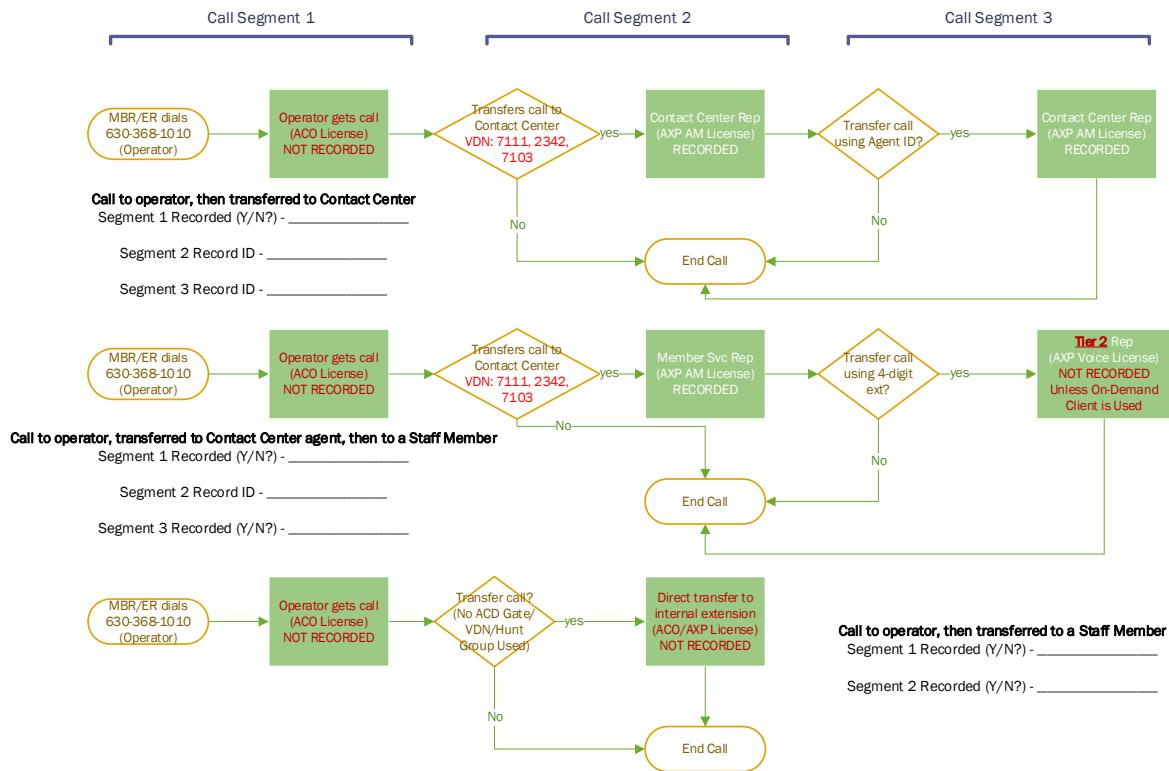
Member/Employer Dials 800# and is transferred once

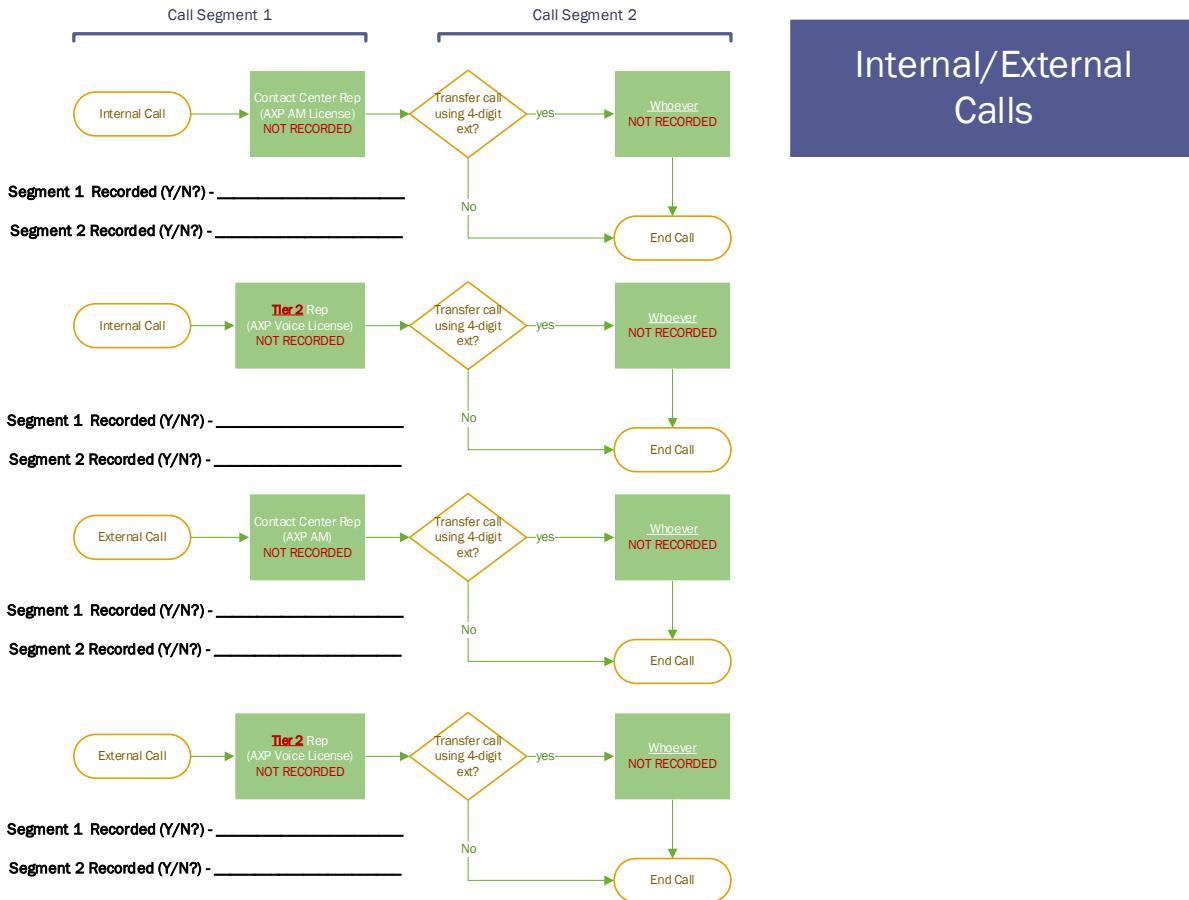


Member/Employer Dials 800# and is transferred twice

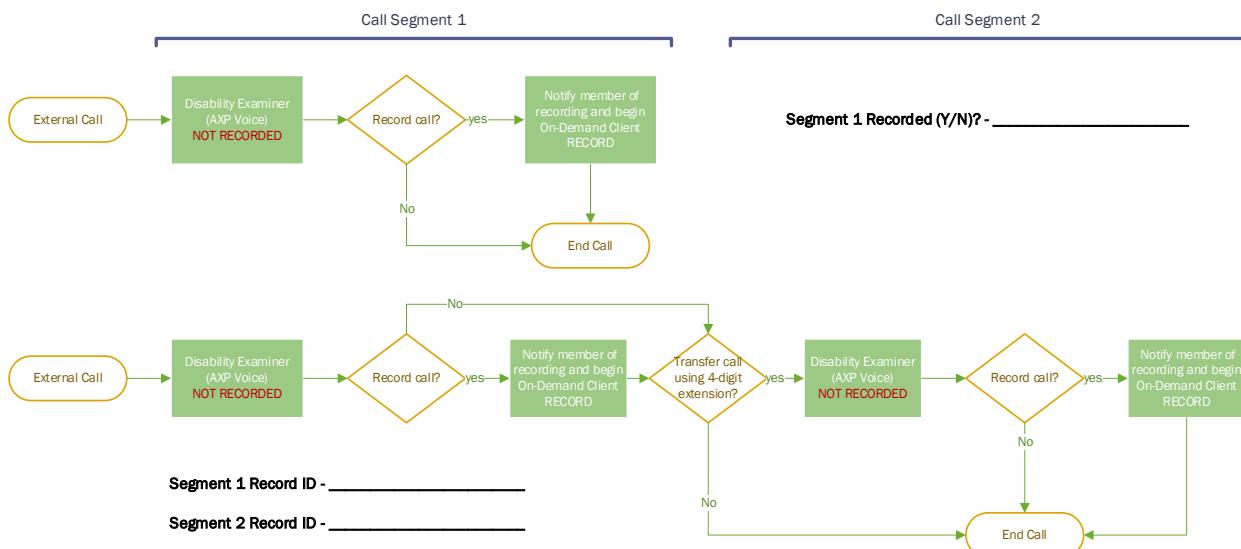


MBR/ER Dials 1010# (Operator) and is transferred





Member dials Disability Examiner directly



Analytical Reporting Testing

The following outlines further details for testing related to real-time and historical reports:

	<p>RingEX Reporting</p> <p>IVR / PEG</p> <p>CBA Reporting</p> <p>RingCX Reporting – Real-time Call Statistics</p> <p>RingCX Reporting – Historical</p> <p>These reports should be able to answer questions related to:</p> <p><u>Volumes</u></p> <p><i>What were your volumes of:</i></p> <ul style="list-style-type: none"> a) Incoming calls that reach and are responded to by a knowledgeable service representative (i.e., exclude messages, etc.)? b) Outgoing calls from service representatives responding to messages (voice mail, receptionist, etc.) or following-up on previous calls? c) Incoming calls satisfied by self-serve options, if any? <p><u>Before Reaching a Service Rep</u></p> <p><i>What number of member phone calls did not connect to a person during business hours because:</i></p> <ul style="list-style-type: none"> a) Busy signal, never enters the system? b) Caller gets pre-recorded 'call another time' message during business hours? c) Abandoned calls (i.e., caller hangs-up while in a menu)? d) Abandoned calls (i.e., caller hangs-up while in a queue or on hold)? e) Busy signal after navigating an automated attendant menu, or after being transferred by a receptionist? f) Call rings unanswered during business hours? <p>-</p> <p><i>Do you have a queue for service representatives? [The entry to the queue could be a recorded message, a menu system or a receptionist.]</i></p> <p><i>If yes:</i></p> <ul style="list-style-type: none"> a) What is the average wait time in seconds in queue for a service representative? <p>-</p> <p><i>Do you have a callback feature on your phone system? [i.e., the caller's telephone number is placed in a queue for callback when their turn comes up]</i></p> <p><i>If yes:</i></p> <ul style="list-style-type: none"> a) Can a member request a callback via the website? b) What was the total volume of callbacks? c) What is the callback completion rate (i.e., what percentage of callers that chose to be called back, were actually reached)? 	
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	<p><u>After Reaching a Service Rep</u></p> <p><i>What was the:</i></p> <p>a) Average talk time? [Do not include: hold or queuing time prior to a member reaching a knowledgeable person, or hold time after a member has reached a knowledgeable person.]</p> <p>b) Average after call work time when service representative is unavailable to take another call?</p> <p>c) Average occupancy %? [time spent handling calls, including after call work, as a percentage of total available time to answer calls.]</p> <p>d) % of calls satisfied by the first contact?</p>		
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Workforce Management (WFM) Testing

The following outlines further details for testing related to the WFM system:

Calls get transferred to correct skill and queue		
Correct screenpops trigger		
Agent has call handling controls		
Correct AUX codes populate		
Agent placed to ACW state after call completion		

End User Training

As a result of the implementation of this new telephony solution, IMRF personnel will require general instruction on:

- **RingEX** Basics for End Users
- **RingCX** Basics for Agents
- **RingCX** Basics for Supervisors
- **RingEX** Training for Administrators
- **RingCX** Training for Administrators

Training may require training material in order to aid with comprehension. Training for **RingEX** and **RingCX** will be:

- Formal (On-Demand) – The following courses can be performed by end users at their own pace.
- Informal (On-going) – Future users may need basic instructions provided via either video links, typed up internally by the SME, or provided via On-the-Job Training (OJT). User guides provided by IMRF IS may also be used to facilitate this training.

Security

IMRF staff should follow the IMRF security policies laid out by the Chief Security Officer and Chief Information Services Officer at all phases of this project while remaining cognizant of:

- Personnel Security
 - Limit physical access to IMRF assets to only those that are cleared.
 - Do not leave sensitive notes, drawings, or other data lying around for others to see, steal, copy, modify, or put others at risk.
 - Visitors should have identification verified. They should sign in and out of the visitor log with dates/times annotated for security purposes.
- Equipment Security
 - Ensure that only approved Project Team members have physical access to this product/service to avoid tampering, physical damage, or the introduction of any other negative element against it.
- Cybersecurity
 - Restrict virtual access only to those that have a need to know.
 - Ensure that default administrator username(s) is changed and that passwords must be changed regularly.
 - Disable any unauthorized guest accounts.
 - Lock down any open ports or interfaces and limit remote access only to required team members.
 - Segregate networks as necessary either via physical means (cabling), configuration of Virtual Local Area Networks (VLANs), approved virtual segmentation software (NSX), or through the use of some other form of in-line network encryption (INE).
 - Never share details of the network configuration of IS infrastructure assets with unauthorized personnel. No matter how big or small, hackers and other adversaries may use some or all of this information to gain unauthorized access to the system(s).

Keep in mind that changes to certain virtual or physical access will require the submission of an IMRF Form AD-20 for approval.

Please report any unauthorized access to this product or service to the SPA, CSO, PJM, and/or Manager-Technology Infrastructure

RingEX and RingCX Subscription Renewals

IMRF's current subscriptions expire on 2/27/2026. The selected candidate will also be responsible for renewing these subscriptions. The following are the details of our existing RingEX and RingCX services.

RingCentral Customer User ID: 63440321031

- RingEX Services
 - DigitalLine Unlimited Advanced (QTY: 250)
 - Additional Local Number (QTY: 1)
- RingCX Services
 - RingCX, named agent seat (QTY: 50)
 - Call recording storage – 30 days, per seat (QTY: 50)
 - Calabrio for RingCX Screen Recording (QTY: 10) – To be increased to 50
 - Calabrio for RingCX Call Recording (QTY: 10) – To be increased to 50

6 additional local numbers will be needed (1 each for Member & Employer Services for UAT, MNT, and PRD).

Lastly, we will require RingCentral Cloud Relay Service for each distinct environment (currently 1, but will need an additional 3 for a total of 4).

Day-0, Day-1, and Day-2 Support

The selected candidate should include Day 0, Day 1, and Day 2 support for a period of 36 months upon contract execution.

Support should include rates for:

- 500 hours for Moves, Adds, & Changes (MAC) to occur during business hours (7:30am-5:30pm US Central Time, weekdays)
- 500 hours for MAC to occur after hours/weekends/holidays

Operations Support

The following sections detail the Operations Support process. Where applicable selected candidate will:

- Setup general alerting
- Execute Preventative Maintenance
 - Perform and document solution health checks as needed including, but not limited to:
 - Reviewing/evaluating log files
 - Solution documentation
- Provide Hotline Support
 - Enable 24x7 hotline support for emergency maintenance
 - Enable ticket notification and tracking

Ongoing Consulting and Development

The following sections detail the Ongoing Consulting and Development process. As part of this process selected candidate will:

- Provide Services under monthly Bundled Hours
 - Provide any services for work on Customer projects, systems, or applications (e.g., consulting, application enhancements, voice recordings, etc.)
 - Deliver inside three-month revolving utilization window
 - Schedule via Account Manager [no Purchase Order (PO) required]

Relationship Management

The following sections detail the Relationship Management process. As part of this process selected candidate will:

- Name an Account Manager
 - Senior Resource that provides a single point of contact for continuity of service
 - Intimate knowledge of Customer applications, processes, projects, etc.
 - Formal Monthly Status Reports & Review with Customer
- Execute Change Management processes
 - Provide formal release management to include establishment of release schedule, 'mini' project management and formal implementation planning review.
 - Management and Tools to support customer UAT Cycles
- Participate in Forward Planning Sessions
 - Conduct a formal review of consulting hours usage
 - Conduct quarterly application and system review to align with customer budget cycle
 - Review system architecture for adequate capacity/redundancy
 - Identify areas for improvement.

Severity Definitions:

Critical	System is completely nonfunctional. Includes IMRF Production Systems that IMRF Member and Employers rely upon for daily telephony support.
High	System is online but major components are failing, causing significant end user issues. Includes IMRF Systems:

	<ul style="list-style-type: none"> • PRD CBA • PRD Survey • PRD Call Recording
Significant	<p>There is an issue that is not a Critical or High that is having an adverse impact upon users.</p> <ul style="list-style-type: none"> • Non-PRD Systems (MNT Environment)
Minor	<p>Any other minor issue.</p> <ul style="list-style-type: none"> • Non-PRD Systems (DEV, UAT Environments)

Response Times:

Severity Level	Service Level During Standard Business Hours (US CST)
Critical	Within 1 hour
High	Within 4 hours
Significant	Within 1 business day
Minor	Within 1 week

Response times outlined refer to calendar days/hours for Fatal or Major issues, and business days/hours for Minor issues or Application Enhancement Requests.

Bid Specification Sheet

QTY	Description	Unit Price	Extended Price
1	Professional Services		
1	RingEX & RingCX Subscription Renewals		
1	Subscription Additions		
1	Maintenance & Support (M&S) – Includes bundled hours		
	TOTAL:		

I acknowledge receipt of a current copy of the IMRF Diversity Procurement Policy ("Policy"). I understand that IMRF will typically award a bid to the lowest cost bidder. However, in order to meet the goals set forth in the Policy, a bid may be awarded to a vendor, other than the low bidder.

I certify that I have completed the IMRF Diversity Business Verification Form and I have attached a completed copy of said form to this bid.

I further understand and acknowledge that a fraudulent certification as to MWDBE status shall: 1) constitute grounds for the immediate termination of any bid award; 2) prohibit my participation in any further IMRF Invitation for Bids; and 3) may result in criminal prosecution to the fullest extent permitted by state and/or federal law.

Finally, I understand that, upon acceptance of this offer by the IMRF Board of Trustees, this offer and related documentation, and the request for bid shall become a binding contract. I agree that any negligence on my part in preparing this bid confers no right to withdraw the offer after it has been accepted by the IMRF Board of Trustees.

Company Name: _____

Authorized Signature: _____ **Date:** _____

Title: _____

IMRF Procurement Approval:

Authorized Signature: _____ **Date:** _____

Title: _____

IMRF Legal Approval:

Authorized Signature: _____ **Date:** _____

Title: _____

IMRF Final Approval:

Authorized Signature: _____ **Date:** _____

Title: _____

Exhibit A

Terms and Conditions

RFP/ BID

IMRF's Request for Proposal (RFP), Invitation for Bids, or any similar document soliciting contractors for the work set forth herein, and Contractor's response thereto, are hereby incorporated by reference into this Agreement as though fully set forth herein. To the extent that there are any conflicts between the RFP or bid document and this Agreement, this Agreement shall prevail.

Code of Conduct

Contractor will comply with all applicable provisions of the IMRF Code of Conduct, a copy of which can be found at www.imrf.org/vendor-code-conduct

Termination of Contract

This Agreement may be terminated at any time by the mutual consent of IMRF and Contractor. Either party may, without the consent of the other party, terminate this Agreement upon 60 days' prior written notice to the other party. Upon early termination, Contractor shall be entitled to payment for satisfactory supplies, equipment and/or services provided as of the date of receipt of notice of termination and with adequate documentation.

Successors and Assigns

The terms of this Agreement will be binding upon and inure to the benefit of the parties and their respective successors and assigns; provided, however, that neither party will assign this Agreement in whole or in part without the prior written approval of the other.

Amendment

Amendments to this Agreement must be made in writing and signed by all parties. If an amendment causes an increase in the Contractor's costs or in the time required for performance, the Agreement may be modified accordingly. Nothing in this clause shall excuse the Contractor from performing.

Severability

If any provisions of this Agreement are held to contravene or be invalid under the laws of any state or jurisdiction, contravention will not invalidate the entire Agreement, but it will be construed as if not containing the invalid provision and the rights or obligations of the parties will be construed and enforced accordingly.

Standard of Care

Services performed by Contractor under this Agreement will be conducted in a manner consistent with that level of care and skill ordinarily exercised by members of the profession currently practicing in the same locality under similar conditions. If the Contractor fails to meet the foregoing standard, Contractor will perform at its own cost, and without reimbursement from IMRF, the professional services necessary to correct errors and omissions caused by Contractor's failure to comply with the above standard and reported to Contractor within one (1) year from the completion of Contractor's services under this Agreement.

Unavoidable Delay

If the Contractor is delayed in the delivery of goods or services purchased under this Agreement by a cause beyond its control, the Contractor must, as soon as it knows of the delay, give written notice to IMRF and request an extension of time for performance. IMRF shall examine the request and determine if such an extension is to be granted. IMRF is under no obligation to grant such an extension.

Performance

Contractor agrees that IMRF shall be the sole judge as to whether work performed under this Agreement has been satisfactory. Any goods furnished shall be received subject to IMRF's inspection and right of rejection.

Relationship between IMRF and the Contractor

Contractor is an independent contractor in the performance of this Agreement, and is not an agent, employee, partner, or in joint venture with IMRF.

Warranties

In addition to all warranties provided by law, Contractor warrants that the services, supplies and/or equipment furnished under this Agreement: (i) will conform to drawings, plans, specifications, samples or other descriptions furnished, specified, accepted, or approved by IMRF, including but not limited to all specifications attached as exhibits to this Agreement; (ii) will be merchantable, of good quality in manufacture and workmanship, free from defects for a period of twelve months or longer if specified in writing, and fit and sufficient for the intended use; (iii) will comply with all federal and state laws, regulations, and ordinances pertaining to the manufacturing, packing, labeling, sale and delivery of such goods; (iv) will be of good title and be free and clear of all liens and encumbrances; and (v) will not infringe any patent, copyright, or other intellectual or proprietary rights of any third party. Contractor agrees to reimburse IMRF for any losses, costs, damages, or expenses, including without limitation, reasonable attorney fees and expenses, arising from failure of such goods to meet such warranties. These warranties shall be in addition to all other warranties, express, implied, or statutory, shall survive IMRF's payment, acceptance, inspection, or failure to inspect such goods.

Waiver

Except as specifically waived in writing, failure by either party to exercise or enforce a right or obligation under this

Agreement shall not affect any subsequent ability to exercise or enforce a right or obligation and will not be construed to be a waiver of any provision except for the particular instance.

Confidential Data and Information

Contractor, including its personnel, agents, and subcontractors, may have access to, collect, or receive confidential data, member records, or other information owned or maintained by IMRF in the course of carrying out its responsibilities under this Agreement. IMRF hereby designates all information received or accessed pursuant to this Agreement as confidential unless otherwise stated in writing. Contractor shall not unnecessarily communicate such data or information within Contractor's operations. No such data or information shall be disclosed or disseminated except as authorized by law and with the written consent of IMRF, either during the period of this Agreement or thereafter. Contractor must return all such data and information, in whatever form it is maintained, promptly at the end of the Agreement or earlier at the request of IMRF, or shall notify IMRF in writing of its destruction.

Security Breach Procedures

For purposes of this contract, "Security Breach" means any act or omission that compromises either the security, confidentiality, availability, or integrity of personal data or the physical, technical, administrative or organizational safeguards put in place by Contractor that relate to the protection of the security, confidentiality, or integrity of personal data. Without limiting the foregoing, a compromise shall include any unauthorized access to or disclosure or acquisition of personal data.

Contractor shall notify IMRF of a Security Breach as soon as practicable, but not later than twenty-four (24) hours after Contractor has become aware of it. Contractor shall notify IMRF of any Security Breaches by telephone and email to Contractor's primary business contact with IMRF. Immediately following Contractor's notification to IMRF of a Security Breach, the parties shall coordinate with each other to investigate the Security Breach.

Contractor agrees to fully cooperate with IMRF in IMRF's handling of the matter, including, without limitation (i) assisting with any investigation; (ii) providing IMRF with physical access to the facilities and operations affected; (iii) facilitating interviews with Contractor's employees and others involved in the matter; and (iv) making available all relevant records, logs, files, data reporting, and other materials required to comply with applicable law, regulation, industry standards, or as otherwise required by IMRF.

Open Records/Open Meetings

Contractor acknowledges that IMRF and this Agreement are subject to the provisions of the Illinois Open Meetings Act (5 ILCS 120/1 *et seq.*) and the Illinois Freedom of Information Act (5 ILCS 140/1 *et seq.*)

Applicable Law

This Agreement and Contractor's obligations and services hereunder are made and must be performed in compliance with all applicable federal and state laws. This Agreement shall be construed and governed in accordance with the laws of the State of Illinois to the extent that such laws are not pre-empted by the laws of the United States of America. By entering into this Agreement, Contractor agrees to submit to the exclusive jurisdiction of the state and federal courts of Illinois and agrees that any action or proceeding against IMRF arising out of or in connection with this Agreement shall be instituted in the Circuit Court of DuPage County or the US District Court for the Northern District of Illinois. IMRF may agree to arbitration or other alternative dispute resolution at its sole discretion.

Indemnity and Hold Harmless Agreement

To the fullest extent permitted by law, the Contractor shall indemnify, keep and save harmless IMRF and its

trustees, agents, and employees against all losses, damages, claims, suits, liabilities, judgments, costs and expenses arising out of (a) any breach or violation by Contractor of any of its representations, warranties, covenants, or agreements set forth herein, (b) any actual or alleged death or injury to any person, damage to any property, or any other damage or loss by whomsoever suffered, claimed to have resulted in whole or in part from performance hereunder, (c) any act, activity, or omission of Contractor or any of its employees,

representatives, subcontractors, or agents, which may arise directly or indirectly from any negligence or from the reckless or willful misconduct of the Contractor, its employees, or its subcontractors, and the Contractor shall at its own expense, appear, defend and pay all charges of attorneys and all costs and other expenses arising therefrom or incurred in connection therewith, and, if any judgment shall be rendered against IMRF in any such action, the Contractor shall, at its own expense, satisfy and discharge the same. This Agreement shall not be construed as requiring the Contractor to indemnify IMRF for IMRF's own negligence.

Nondiscrimination / Equal Employment Opportunity
Contractor will comply with applicable provisions of the State and Federal constitutions, laws, and regulations pertaining to unlawful discrimination, harassment, and equal employment opportunity, including but not limited to the U.S. Civil Rights Act, Section 504 of the Federal Rehabilitation Act, the Americans with Disabilities Act, and the Illinois Human Rights Act. 42 USC 12101 *et seq.*, 775 ILCS 5, 775 ILCS 10.

Employment of IMRF Employees

Contractor agrees to notify IMRF if it solicits or intends to solicit for employment any of the employees of IMRF during the term of the Agreement.

Insurance

Contractor shall, at its sole cost and expense, procure and maintain in full force and effect during the term of this Agreement, a Certificate of Insurance naming IMRF an additional insured for all required bonds and insurance. Certificates may not be modified or canceled until at least 30 days' notice has been provided to IMRF. Contractor shall provide in the following minimum amounts: (a) General Commercial Liability-occurrence form in the amount of \$1,000,000 per occurrence (Combined Single Limit Bodily Injury and Property Damage) and \$2,000,000 Annual Aggregate; (b) Auto Liability, including Hired Auto and Non-owned Auto, in the amount of \$1,000,000 per occurrence (Combined Single Limit Bodily Injury and Property Damage); and (c) Worker's Compensation Insurance in the amount required by law. Insurance shall not limit Contractor's obligation to indemnify, defend, or settle any claims. Contracts that include contractor- provided delivery to IMRF's Oak Book office require a separate certificate of insurance for the building. IMRF will provide the necessary information.

Payment Procedures

Contractor shall accept electronic payments by credit card and/or Automated Clearing House (ACH) payments. IMRF will comply with the Local Government Prompt Payment Act, 50 ILCS 505/1 *et seq.*, in that any bill approved for payment must be paid or the payment issued to the Contractor within 60 days of receipt of a proper bill or invoice. If payment is not issued to the Contractor within this 60 day period, an interest penalty of 1.0% of any amount approved and unpaid shall be added for each month or fraction thereof after the end of this 60 day period, until final payment is made.

Exhibit B

VERIFICATION OF “MINORITY OWNED BUSINESS”, “DISABLED OWNED BUSINESS” or “WOMAN OWNED BUSINESS” STATUS

____ verifies that it DOES / DOES NOT meet
(Firm Name)
the requirements to be classified as a “**Minority Owned Business**” as defined in Illinois Statute 30-ILCS-575/2 Business Enterprise for Minorities, Women, and Persons with Disabilities Act. (Excluding the statutory maximum of 75 million in gross annual sales)

____ verifies that it DOES / DOES NOT meet
(Firm Name)
the requirements to be classified as a “**Female Owned Business**” as defined in Illinois Statute 30-ILCS-575/2 Business Enterprise for Minorities, Women, and Persons with Disabilities Act. (Excluding the statutory maximum of 75 million in gross annual sales)

____ verifies that it DOES / DOES NOT meet
(Firm Name)
the requirements to be classified as a “**Disabled Owned Business**” as defined in Illinois Statute 30-ILCS-575/2 Business Enterprise for Minorities, Women, and Persons with Disabilities Act. (Excluding the statutory maximum of 75 million in gross annual sales)

____ verifies that its gross annual sales for the
(Firm Name)
last fiscal year DID / DID NOT exceed \$75,000,000 in as evidenced by its annual federal tax return.

____ verifies that it IS / IS NOT a publicly held/traded firm.
(Firm Name)

Signature _____ Title _____

Date _____

Pertinent definitions from Section 2 of the Business Enterprise for Minorities, Women and Persons with Disabilities Act (30 ILCS 575/2):

(A) For the purpose of this Act, the following terms shall have the following definitions:

(1) "Minority person" shall mean a person who is a citizen or lawful permanent resident of the United States and who is any of the following:

(a) American Indian or Alaska Native (a person having origins in any of the original peoples of North and South America, including Central America, and who maintains tribal affiliation or community attachment).

(b) Asian (a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, but not limited to, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam).

(c) Black or African American (a person having origins in any of the black racial groups of Africa). Terms such as "Haitian" or "Negro" can be used in addition to "Black or African American".

(d) Hispanic or Latino (a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race).

(e) Native Hawaiian or Other Pacific Islander (a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands).

(2) "Female" shall mean a person who is a citizen or lawful permanent resident of the United States and who is of the female gender.

(2.05) "Person with a disability" means a person who is a citizen or lawful resident of the United States and is a person qualifying as a person with a disability under subdivision (2.1) of this subsection (A).

(2.1) "Person with a disability" means a person with a severe physical or mental disability that:

(a) results from:	hemophilia,
amputation,	respiratory or pulmonary dysfunction,
arthritis,	an intellectual disability,
autism,	mental illness,
blindness,	multiple sclerosis,
burn injury,	muscular dystrophy,
cancer,	musculoskeletal disorders,
cerebral palsy,	neurological disorders, including stroke and epilepsy,
Crohn's disease,	paraplegia,
cystic fibrosis,	quadriplegia and other spinal cord conditions,
deafness,	sickle cell anemia,
head injury,	ulcerative colitis,
heart disease,	specific learning disabilities, or
hemiplegia,	end stage renal failure disease; and

(b) substantially limits one or more of the person's major life activities.

Another disability or combination of disabilities may also be considered as a severe disability for the purposes of item (a) of this subdivision (2.1) if it is determined by an evaluation of rehabilitation potential to cause a comparable degree of substantial functional limitation similar to the specific list of disabilities listed in item (a) of this subdivision (2.1).

(3) "Minority owned business" means a business concern which is at least 51% owned by one or more minority persons, or in the case of a corporation, at least 51% of the stock in which is owned by one or more minority persons; and the management and daily business operations of which are controlled by one or more of the minority individuals who own it.

(4) "Female owned business" means a business concern which is at least 51% owned by one or more women, or, in the case of a corporation, at least 51% of the stock in which is owned by one or more women; and the management and daily business operations of which are controlled by one or more of the women who own it.

(4.1) "Business owned by a person with a disability" means a business concern that is at least 51% owned by one or more persons with a disability and the management and daily business operations of which are controlled by one or more of the persons with disabilities who own it. A not-for-profit agency for persons with disabilities that is exempt from taxation under Section 501 of the Internal Revenue Code of 1986 is also considered a "business owned by a person with a disability".

(4.2) "Council" means the Business Enterprise Council for Minorities, Women, and Persons with Disabilities created under Section 5 of this Act.

(8) "Certification" means a determination made by the Council or by one delegated authority from the Council to make certifications or by a State agency with statutory authority to make such a certification, that a business entity is a business owned by a minority, female, or person with a disability for whatever purpose. A business owned and controlled by women shall be certified as a "female owned business". A business owned and controlled by women who are also minorities shall be certified as both a "female owned business" and a "minority owned business".

(9) "Control" means the exclusive or ultimate and sole control of the business including, but not limited to, capital investment and all other financial matters, property, acquisitions, contract negotiations, legal matters, officer-director-employee selection and comprehensive hiring, operating responsibilities, cost-control matters, income and dividend matters, financial transactions and rights of other shareholders or joint partners. Control shall be real, substantial and continuing, not pro forma. Control shall include the power to direct or cause the direction of the management and policies of the business and to make the day-to-day as well as major decisions in matters of policy, management and operations. Control shall be exemplified by possessing the requisite knowledge and expertise to run the particular business and control shall not include simple majority or absentee ownership.

(10) "Business concern or business" means a business that has annual gross sales of less than \$75,000,000 as evidenced by the federal income tax return of the business. A firm with gross sales in excess of this cap may apply to the Council for certification for a particular contract if the firm can demonstrate that the contract would have significant impact on businesses owned by minorities, women, or persons with disabilities as suppliers or subcontractors or in employment of minorities, women, or persons with disabilities.

(B) When a business concern is owned at least 51% by any combination of minority persons, women, or persons with disabilities, even though none of the 3 classes alone holds at least a 51% interest, the ownership requirement for purposes of this Act is considered to be met. The certification category for the business is that of the class holding the largest ownership interest in the business. If 2 or more classes have equal ownership interests, the certification category shall be determined by the business concern.

(Source: P.A. 98-95, eff. 7-17-13; 99-143, eff. 7-27-15.)