



Request for Proposal (Services)

Project Name: Sitecore Website Replacement Project

Date: April 10, 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 an agent multiple employer 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. Overall, IMRF serves approximately 525,000 participants.

IMRF provides benefits to eligible employees of approximately 3,062 units of government. IMRF has approximately 196,859 active members, 169,066 inactive members, and 158,379 retirees and beneficiaries. We manage assets of approximately \$60 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

Baldrige Criteria for Performance Excellence & Illinois Performance Excellence

In our journey towards excellence, IMRF has adopted the Baldrige Criteria framework in order to help us develop and maintain continuous improvement efforts. The Baldrige 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 Baldrige 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 Baldrige National Quality Award, the first public pension fund in the nation to receive this prestigious award.

Customer Service Principles

The IMRF 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 *Sitecore Website Replacement Project* as described in the sections below. The bids should be submitted to IMRF on or before the close of business at 4:00 PM CDT on **April 30, 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 June 5, 2026, will be confirmed by a purchase order issued to the successful bidder.
3. Equipment must be new and fully eligible for manufacturer's warranty.
4. 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.

The building dock has the following restrictions:
Height of Truck 14 feet
Length of Truck 40 feet
Size of Deliveries
Not wider than 28ft. and higher than 76 in.
Slope of the Loading Dock....
Slope of the ramp is 9 degrees
5. 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.
6. IMRF is exempt from State and Local sales and use taxes.
7. 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.
8. 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.
9. The proposal 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.
10. IMRF may terminate any bid award, upon thirty (30) days written notice to the successful bidder.
11. 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.

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 Brook 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.)

Exhibit C

RFP Scope of Work and Requirements

IMRF Sitecore Website Replacement Project

Lift, Fix, and Improve Current Sitecore Websites
And

Develop a Multi-year Roadmap for Improvements

Proposals Due:

4:00 PM Central Time on Thursday, April 30, 2026

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1. INTRODUCTION

The purpose of this Request for Proposal (RFP) is to solicit proposals from firms that are part of the Sitecore Solution Partner program. The Illinois Municipal Retirement Fund (IMRF) plans to replace its two current Sitecore.NET Version 9.0.2 (rev. 180604) websites in a “Lift, Shift, and Improve” project with the assistance from these qualified Sitecore Solution Partners. The RFP also includes soliciting consulting services for long-term planning, training, and support services. It is important to closely review this Exhibit C (RFP Scope of Work and Requirements) along with Exhibit D (Key IMRF Information) as they provide scope and requirements for the project.

IMRF is currently working with Sitecore to obtain the SitecoreAI platform and related services. It is expected that Sitecore, the Sitecore Solutions Partner selected via this RFP, and IMRF will work very closely in partnership to deliver the new IMRF SitecoreAI websites and related activities included in this RFP.

IMRF serves over 525,000 pension fund members and retirees employed by 3,100 different employers across the state of Illinois. IMRF has a proprietary pension administration system that includes secure account web access and while this project is not changing these secure websites, there will be links in the public site to drive customers to the secure sites. No personal or sensitive information will be exchanged between the public website imrf.org and these secure pension administration websites.

IMRF tentatively defined four phases in this RFP which are defined below. However, bidders may recommend modification of these phases in their proposals, and it is likely that other phases may come about from the development of a roadmap as described in Phase III below.

Planned Project Phases

Phase I - “Lift, Shift, and Improve” www.imrf.org to be completed no later than First Quarter 2027

Phase I is planned to involve several incremental steps. First, a move from the current on-premises hosting of www.imrf.org to building a SaaS environment that will include IMRF infrastructure alterations, selecting a hosting provider and installing a new IMRF SitecoreAI environment in a hosted environment. Next, IMRF wishes to move the current imrf.org website in a “lift, shift, and improve” manner to ensure the existing functionality of the www.imrf.org website is deployed on the new hosted SitecoreAI platform. This “lift and shift” must include all custom functionality produced by IMRF’s current Sitecore support vendor, such as the custom functionality that delivers “pop-up” ads and the customer functionality that enables navigation within our site’s Member Learning Center.

As part of the “lift and shift” of the current imrf.org website, this first phase must also include the following improvements:

- Improve the current website as needed to ensure the current ADA (WCAG 2.1) requirements are met.
- Improve imrf.org to deliver responsive website capabilities to phones and tablets for users of imrf.org.

In addition to planning, development, system documentation, testing, and implementation services the selected firm must also develop a plan for training the capabilities necessary to update the sites in real time. This training plan must be for IMRF staff integrated with the hosting provider and other support groups necessary for IMRF to gain at least partial autonomy for supporting both the public internet and staff intranet websites.

Phase II - “Lift, Shift, and Improve” COMPASS intranet completed no later than Second Quarter 2027

The second major phase of the project is a move from the current on-premises hosting of the staff intranet called COMPASS to SitecoreAI. IMRF plans to also move the current intranet called COMPASS in a “lift and shift” manner with any necessary work to ensure the existing functionality of COMPASS. As is the case with imrf.org, the upgrade of COMPASS must also include improvements to:

- Improve the current website as needed to ensure the current ADA WCAG 2.1 requirements are met.

The intranet COMPASS does not need responsive capabilities for phones and tablets. Phase II also includes all the planning, development, testing, implementation services, and training just as described in Phase I.

Phase III - Develop a multi-year roadmap for future website improvements

Phase III will require the Sitecore Solutions Partner to develop and deliver a multi-year roadmap of improvements for both imrf.org and COMPASS. To aid the vendor, IMRF will provide access to various user experience reviews already conducted. A summary of current findings is included in Exhibit D of this RFP. Throughout 2026, IMRF’s UX Designer will move forward with implementation of a Digital Adoption Strategic Action Plan, which includes a robust user research plan that will help inform potential redesign activities for the roadmap and in future phases.

The Sitecore Solutions Partner must facilitate sessions with various IMRF staff to gather input and aid in building a long-term vision and plan – aka a roadmap – for updating the current websites. These future upgrades to imrf.org and COMPASS would be after the lift, shift, and improve phases are complete and the roadmap is also defined. This roadmap document is a vendor deliverable that should be built incrementally as recommended by the Solutions Partner, but a draft version must be available by August 2027 and a final version in September 2027. The actual improvements that become defined in the roadmap will become future projects and are not part of this RFP.

Phase IV – Solution Warranty & Ongoing Support Program

Once Phase I is completed and in production, IMRF will gradually assume responsibility for

maintenance and support. During that time, the Sitecore Solution Partner must provide SitecoreAI support services to IMRF. If the Solutions Partner does not have an ongoing support program to propose, the partner must recommend other support services options in the proposal. The Solutions Partner must also explain the warranty provided as part of the lift, shift, and improve services being required by this RFP. Other support services may include technical and other help for activities that come about from the roadmap and/or for maintenance issues.

2. IMRF BACKGROUND

IMRF is the administrator of an agent multiple-employer public employee retirement system. The Illinois State Legislature established IMRF in 1939. IMRF operations began in 1941 to provide retirement, death, and disability benefits to employees of local units of government in Illinois. Members, employers, and annuitants elect eight trustees who govern IMRF. IMRF is separate and apart from the Illinois state government and does not receive state funding. IMRF serves over 525,000 participants made up of actively contributing members, inactive members that still maintain accounts, retirees or other annuitants, as well as the 3,100 employer organizations (local units of government) to which these customers are associated. All these IMRF stakeholders are collectively referred to as “customers” throughout this RFP.

3. RFP INFORMATION

3.1. Bid Process Requirements

3.1.1. Submission Deadline

Complete proposals must be received at the IMRF Oak Brook office on or before 4:00 PM Central Time on Thursday, April 30, 2026.

3.1.2. Costs for Development of Proposals

The cost of developing and submitting the proposal is the responsibility of the bidder. This includes costs to determine the nature of this engagement, preparation of the proposal, submitting the proposal, negotiating for the contract, as well as any other costs associated with this RFP process.

3.1.3. Submitting Questions

Bidders may send inquiries concerning this RFP by email only to the designated point of contact. Email messages holding questions for IMRF must have a subject, the specific section, subsection, and page number(s) of the RFP in the first line of the email message body.

3.1.4. Deadline for Submitting Questions

IMRF will respond to all questions submitted by 4:00 PM CT on April 17, 2026. Questions that are not submitted by this deadline will not receive a response.

3.1.5. IMRF Response to Questions

Bidders should send questions as they arise to receive prompt responses. IMRF will post answers to all questions received during the question period on or before April 22 on the procurement section of the IMRF website found at:

[Open Requests for Proposals](#)

IMRF will not identify the bidder that submitted each question.

3.2. Evaluation Criteria

3.2.1. Evaluation of Proposal Packets

All proposals (Project and Cost Proposals) submitted by qualified bidders before the deadline will be judged by the following criteria:

1. Does the bidder's proposal satisfy IMRF requirements as defined throughout the RFP?
1. Does the bidder's proposed project team possess the education, skills, and experience needed to deliver the services proposed?
2. Does the bidder (and subcontractors if applicable) have a successful history with initiatives similar to the goals, scope, and methods being proposed at IMRF?
3. Does the bidder, proposed staff, and subcontractors (if applicable) have positive references from previous clients that are of comparable size, scope, and complexity of IMRF and where previous work was similar in scope to the services proposed at IMRF?

3.2.2. Oral Presentations

IMRF may select at least one finalist proposal based on the evaluation criteria described. IMRF may ask the bidders who submitted the finalist proposal(s) to provide an oral presentation of their proposal via MS Teams or at the IMRF offices in Oak Brook, Illinois as soon as possible within one week of notification. Much of the oral presentation must be provided by team members that will be working directly with IMRF staff.

When oral presentations are complete, IMRF will evaluate the finalist bidder(s) based on the following criteria:

1. The clarity of the oral presentation in communicating the bidder's proposed project implementation plan.
2. The ability of the bidder and specifically the proposed project team to convey the activities and methods that will be used to deliver the services included in the proposal.
3. The quality and cost effectiveness of the bidder's response to the pricing and related requirements defined in the RFP.

3.2.3. Best and Final Offer

After the initial evaluation of the written proposal, evaluation of oral

presentations and other information (if requested), it may be necessary to clarify items in the RFP and the bidder's proposal. IMRF may, at its sole discretion, choose to contact and/or meet with one or more bidders to gather more information or to clarify information already received. Once IMRF has gathered additional information and/or received clarification or answers to questions, IMRF may ask that one or more bidders modify their proposals based on guidelines provided by IMRF. At this time, IMRF may ask one or more bidders to prepare the best and final offer (BAFO) that considers this additional information and guidance provided by IMRF. This BAFO will be considered and evaluated along with previous information to reach the final evaluation of the bidder's proposal.

3.2.4. Award and Contract Negotiations

Upon final evaluation, IMRF will award the work to the bidder whose proposal, in IMRF's opinion, is most advantageous and best value to IMRF. Upon awarding the work to the winning bidder, IMRF will enter contract negotiations with that bidder.

IMRF has the right to reject any proposals (in whole or in part) in the best interests of IMRF. IMRF may cancel this Request for Proposals or reject proposals at any time prior to contract execution and is not required to furnish proposal scoring or a statement of the reasons why a particular proposal was not deemed the most advantageous and best value to IMRF.

Should IMRF determine in writing and in its sole discretion that only one bidder is fully qualified, or that one bidder is more qualified than others under consideration, at any time during this process, the work may be awarded to that bidder, and a contract may be negotiated and executed.

The contract will serve as the award document and incorporate by reference all the requirements, terms and conditions of the RFP, the bidder's proposal, and other documents as required and as negotiated with the selected bidder.

3.3. Proposal Format Requirements

3.3.1. General Format Requirements

IMRF desires to evaluate proposals on their merits of quality apart from their proposed cost. Consequently, bidders must submit two separate packages defined below:

1. **Project Proposal** containing all information about the bidder's qualifications, proposed solution, project methodology, and a draft project plan that follows the IMRF recommended four phases described in the Introduction of the RFP Scope of Work. Bidders may also recommend an alternative phased approach in addition to IMRF's four phases, and the bidders alternative will be considered if

it achieves the same end results.

2. **Cost Proposal** containing all information about the bidder's proposed costs, time and contractual terms and conditions. The Cost Proposal must include all costs of each Phase and other services, and no costs may be included in any other parts of the bidder's proposal. Only costs included in the Cost Proposal will be considered, and the contract will be based solely on costs included in the Cost Proposal.

IMRF requires that bidders at a minimum provide a fixed cost for IMRF's Phase I and Phase II, however IMRF will consider alternative cost proposals for Phase I and Phase II if an alternative approach was included in the Project Proposal. Phase III and IV may be structured as fixed cost for the project, or time and materials but time and materials proposals must include a capped budget amount per calendar year.

3.3.2. Digital Copies

The Project Proposal and the Cost Proposal must both be submitted separately in digital form by email in Microsoft Office (Word, Excel, Project and PowerPoint files), or PDF format.

3.3.3. Project Proposal Format Requirements

Project Proposal and Cost Proposal must both include all specified sections organized in the following order:

3.3.3.1. Title Page

A single page that must include:

1. Bidder's legal name
2. Title of Proposal
3. Submission Date
4. Name, Title, and signature of authorized representative of the bidder
5. Contact information for the authorized representative of the bidder.

3.3.4. Cost Proposal Summary

3.3.4.1. Bidders must summarize all costs to satisfy the requirements of this RFP using the solutions they propose in their **Project Proposal**. This summary must include all costs involved in the delivery of the project as proposed. All costs included in this proposal are binding. The bidder must assume responsibility for any variations in costs that occur at actual purchase. No other costs will be included in the contract when awarded.

3.3.4.2. Costs That Should Not Be Included:

IMRF does not pay bidder travel costs or other related expenses. These costs should be incorporated into all hourly rates, fixed prices, or other billing units and should be inclusive of all bidder expenses.

3.3.4.3. Payment Schedule

The bidder must include as part of the Cost Proposal a schedule showing each planned invoice to IMRF and the associated Payment Milestones. This schedule will be used to manage all payments to the selected bidder throughout the course of the project.

The Payment Milestones are defined as measurable units of work with results that can be reviewed and approved by IMRF. All payments require a successfully completed unit of work that can be compared against predetermined acceptance criteria. IMRF will accept each deliverable if it meets the predetermined acceptance criteria and will process the applicable payment within 30 days of receiving the invoice that matches the predetermined payment milestone amount.

3.3.5. Proposed Change Control Process

All changes to scope, terms, conditions or any other part of the contract with the selected vendor must follow a structured change control process. Any changes that will affect the total cost as described in Cost Proposal must be submitted in writing in advance. As part of the Cost Proposal, the bidder is to provide their standard methods for defining potential change orders and for estimating the costs for change orders. If the bidder uses a mixture of methods (fixed cost vs. hourly rates for example), each method must be explained, and the bidder must define what method(s) would be used under what circumstances at IMRF.

If hourly rates or a fixed cost based on hourly rate method is proposed, the maximum hourly rates for each type of resource or service must be identified. These maximum hourly rates will be negotiated and included in the contract that would be in effect throughout the term of the contract.

4. PROJECT SCHEDULES AND RESOURCES

4.1. Vendor Selection Process and Project Timeline

- RFPs Released April 10, 2026
- Questions Due from Bidders..... April 17, 2026, 4PM Central
- IMRF Final Response to Bidder Questions April 22, 2026
- Proposals Due from Bidders April 30, 2026, 4PM Central
- Proposal Evaluations..... May 1-7, 2026
- Notification Sent to Finalist(s) May 8, 2026
- Oral Presentations from Bidders..... May 13-15, 2026
- Best and Final Offers (if needed) May 18-21, 2026
- Contract Awarded..... June 5, 2026

4.2. Website Replacement Project Core Project Team

The Sitecore Website Replacement Project will be governed daily through a small group of stakeholders:

- Project Sponsors (2)
- Project Manager (1)
- Project Team Members (3)
- Other staff and consultants as needed by IMRF

4.3. IMRF Work Schedules

IMRF staff work on a flexible schedule. Meetings that require staff attendance should be held Monday through Friday between the hours of 9:30 AM and 3:30 PM to accommodate the flexible staff schedules.

4.4. IMRF Project Related Facilities

IMRF will provide onsite conference rooms and temporary cubicle offices when needed. The bidder must include a high-level summary of any onsite meetings at IMRF that may be needed and the number of bidder's team that may need space at IMRF. The bidder must provide all laptops, desktop computers, and associated software necessary for their staff to perform their work.

5. BIDDER QUALIFICATION REQUIREMENTS

5.1. Introduction

IMRF will not evaluate proposals from bidders that do not meet the minimum qualifications, and such proposals may be automatically disqualified from the

selection process. If a team of firms is proposed, the qualifications below may be met collectively by the team unless otherwise specified. If a team is proposed, the proposal requires identification of which firm meets which specific qualifications.

Bidders must respond specifically to each item listed below in this section. The bidder's proposal must list each section and sub-section in their proposal along with a response to each item. The bidder's response should explain how the bidder will meet the requirements of the specific RFP item. A response is required even if the response is "not applicable."

5.2. Company Information

Each bidder included in the proposed team (prime and all subcontractors) must provide information on its organization. The information should be categorized into the following sections:

5.2.1. Company Overview

Bidders must provide a general company overview that includes a company history, total number of staff, locations, and strategic partnerships. All information must be provided by the prime contractor, subcontractors, or software providers that are part of the team. Please limit the overview to one page per firm.

5.2.2. Company Uniqueness

Each bidder must provide a discussion as to what unique qualifications their company has that sets them apart from other companies. Each company must limit their discussion to one page each.

5.2.3. Company Ownership Structure

Each bidder must provide information on the type of business structure such as publicly held or private.

5.3. Bidder Experience and Other Clients

5.3.1. Service Delivery Website Experience

Bidder and their proposed team must have proven and successful experience working with service delivery organizations in the financial, insurance, investments, pension plan, public sector services, retail, or related fields to implement institution-wide websites.

5.3.2. Documentation of Recent Projects

Each bidder (prime and all subcontractors) must provide a list of at least three recent projects where they have provided services like those requested by IMRF in this RFP and projects that serve customers with similar services and customer needs. For each project listed, provide the information described below. Each client project summary should be no longer than two pages.

Name of Organization

Name of the Project

Project Contact Person

Name, title, current phone number and current email address for the reference contact person who has firsthand knowledge of bidder's performance on the project. Bidder must also provide information on the contact person's role on the project and length of time on the project.

Project Start and End Dates

Specify the dates that the bidder began and finished working on the project.

Project Costs

A general description of the total project costs specifically related to the bidder's role in the project.

Project Objectives

Describe the objectives of the project such as customer service delivery improvement, replacement of obsolete technology, deployment of new services, etc. Describe the number of customers or users served by the website project being used as the reference.

Technology Type(s)

Describe the technology implemented as part of the project including product names and versions of software implemented plus any other tools, components, or services that were deployed.

Bidder's Role

Describe the bidder's role on the project

Project Outcomes

Describe how the project succeeded or failed to meet its objectives.

Project Changes

Describe any significant changes to scope, schedule, cost, or quality that occurred during the bidder's work on the project. Also, describe any "lessons learned" from any of these changes that could be applied to this IMRF project.

5.4. Use of Subcontractors

Proposals that include subcontractors will be accepted, so the qualification requirements are broken down into two categories – prime contractor and subcontractor. If the bidder intends to use subcontractors on the project, the subcontractor(s) must be named and their role in providing goods or services must be explained in Subcontractor section below.

5.4.1. Prime Contractor

A prime contractor is defined as the “bidder” and if selected will be the party named in the contract with IMRF. IMRF intends to sign a single contract with a prime contractor for all work associated with this RFP. IMRF understands that responding to this proposal and providing the services may require a team of firms, so subcontractors are allowed as described below.

5.4.2. Subcontractor

A subcontractor with respect to this RFP is any company or person that the prime contractor uses in addition to its own employees for delivering goods or services related to this RFP. A subcontractor may include, but is not limited to professional service providers, software providers, and related firms that the prime contractor may need to employ to fully deliver the proposed services. In all cases, the prime contractor is the sole party in the contract with IMRF, and the prime contractor will be fully responsible for delivery of all services and/or solutions.

Bidder must list and describe the role of each subcontractor as a response to this section in their proposal.

5.5. Project Team

5.5.1. Project Team Description

Bidders must provide a thorough and complete description of the entire project team including subcontractors (if any). IMRF also understands that bidders often use project staff to support other company business from time to time. Therefore, the bidder must state the duration (dates) or milestones on which each key team member will be assigned to the IMRF project and the percentage of each team member’s time that will be dedicated to the IMRF project during their assignment(s) to the project.

5.5.2. Project Team Organization

Bidders must provide an organizational chart of the entire project team (prime and all subcontractor personnel). The organizational chart must show each key team member’s name, role, and responsibilities. A chart or similar format may be used.

5.5.3. Project Team Skills

Bidders must ensure that all the project team members working directly with IMRF and other project participants have strong verbal and written communication skills. A bidder may use offsite or offshore resources for development or other purposes; however, these resources must be approved by IMRF. The bidder must specify in the proposal what (if any) services delivered as part of the proposal will be conducted offshore. The proposal must name and explain all project roles and explain how and where their respective responsibilities will be conducted.

5.5.4. Resumes of Project Team

Bidders must provide resumes for all key staff proposed for this project. At a minimum, this requirement should include the proposed project manager as the primary point of contact with IMRF. Bidders should also provide resumes for any key functional or technical staff expected to be involved for at least 50% of the project duration.

6. SOLUTION REQUIREMENTS

6.1. Bidder's Design of Services

Phase I and Phase II – As also defined in Section 1 of this document, bidders must describe how they will fully implement the Lift, Shift, and Improve design and services that will duplicate all the current functionality of the Phase I imrf.org website and the Phase II COMPASS staff intranet onto the SiteCoreAI platform. This includes making both sites compliant with ADA WCAG 2.1. requirements, and introduce responsive capabilities for imrf.org. A summary narrative and any graphics that the bidder wishes to include may be used to fully explain the entire process. The bidder must include all major steps from beginning to end of the process. This narrative should also include the activities that IMRF will be required to participate in during the project.

Phase III - Bidders must describe how they will create a long-term roadmap for continuous improvements of imrf.org and COMPASS. The Phase III proposal should provide a description of the bidder's approach for creating a roadmap, explain types of interactions expected with IMRF staff, bidder services, and examples of three-to-five-year roadmaps like IMRF websites from previous clients served by the bidder. The proposal must also consider the information provided in Exhibit D regarding current and future plans.

Phase IV – Bidders must describe their own existing and/or recommend services for Solutions Warranty & Ongoing Support services that may be needed by IMRF in the future. As explained in Section 1 of this document, the bidder's proposal should describe the availability of support services, how they are delivered by the bidder, and the Cost Proposal must include the costs for the services described in this section.

6.2. Website and Content Management System Performance Standards

The bidder must specifically describe how their proposed solution will meet or exceed all the standards described in this section.

6.2.1. Uptime

The solution must provide for an uptime of 99.999% during core business hours and

99.95% during non-core business hours for all major functions including:

- Responding to browser calls for rendering of web pages and related content.
- Access to development copy for editing of content.
- Publication of development copy to production.
- Scheduled system maintenance and patching.

6.2.2. Performance Requirements

On average IMRF's current website response time is 1.5 seconds, and this must be maintained in the new websites moved to the SitecoreAI platform. IMRF's performance requirements for the future are to improve this performance down to 1 second. The bidder's proposal should include options for improving the current response times during Phase I and II. The bidder must explain how they will meet or exceed the current 1.5-second performance requirement and ideally deliver 1-second performance.

6.2.3. Load Limits

The solution must be configured to accommodate 4,500 daily users on imrf.org and 300 daily users of COMPASS. The website must also pass a simulated load test of a minimum load of 100 concurrent sessions of IMRF staff users and 1,000 concurrent sessions of external users on imrf.org.

6.2.4. Search Performance

The solution must have built-in or fully integrated internal search functionality. In the bidder's proposal, the Sitecore Partner should include search options and work with IMRF to decide the best solution for search functionality from those recommendations. The search function must be returned and rendered within 1.5 seconds.

6.3. Technical Infrastructure

IMRF will work with the selected solutions partner and hosting provider in the first stages of the project to set up and configure database and application servers according to best practices recommended for enterprise SitecoreAI solutions installations. In response to this requirement, bidders must describe how their solution will be structured including any resources that are needed but not provided by the bidder. See Exhibit D – Key IMRF Information for more information and direction on current and future desired infrastructure.

6.4. Project Planning Requirements

Bidders have flexibility to convey the approach and method that will be used to deliver the services asked for by this RFP. Bidders may assume certain tasks and processes to run concurrently as they see fit. Bidders must include a high-level project plan in their Project Proposal in a phased timeline.

The project plan must:

1. Identify critical activities and milestones

2. Estimate time for project phases and ensure completion for each phase on or before the defined 2027 dates for Phase I and Phase II
3. Indicate phases and activities that are dependent
4. Indicate phases and activities that are concurrent
5. Must be based on the overall availability of IMRF resources when needed as defined in this RFP.
6. Must limit any major project activities such as “Go Live” that require significant IMRF resources during January through mid-March which are busy times year end processing and reporting.

6.5. Website Testing, Content Review, and Update Periods

Bidders must plan for a period of website content review and update lasting 20-30 working days between the point when each of the sites are fully configured and tested by the bidder in the staging environment and the public launch. During this period IMRF staff will assume responsibility for reviewing and testing all content and functionality on the website and finding and documenting errors and defects. It is the vendor’s responsibility to correct the errors and defects in advance of site publication.

The existing IMRF.org and COMPASS websites will be continuously updated during the period when Phase I and Phase II are underway. The vendor must explain how these changes that occur during Phase I and Phase II will be applied to the websites prior to final testing and deployment in production and availability to customers.

Exhibit D

Key IMRF Information

Content Inventory

IMRF.org (Public Website / DMZ)

The IMRF.org content inventory consists of approximately:

- 2,000 pages
- 20 templates
- 10 layouts
- 60 sub-layouts
- 30 renderings/web controls

COMPASS (Staff Intranet)

The COMPASS intranet content inventory consists of approximately:

- 12,000 pages
- 50 templates
- 3 layouts
- 110 sub-layouts
- 30 renderings/web controls

Media Library

The media library currently contains approximately:

- 8,000 PDFs
- 7,000 images
- 1,000 miscellaneous files
- 600 Word documents

Forms

Both IMRF.org and COMPASS utilize Web Forms for Marketers (WFFM):

- IMRF.org: 4 forms
- COMPASS: 12 forms

Workflows

- **IMRF.org:** A basic workflow with Submit → Review → Publish stages
- **COMPASS:** Approximately 15 workflows, some including:
 - Additional approval steps

Exhibit D

Key IMRF Information

- Email notifications to approvers and/or content authors
- Email notifications tied to publishing status and required actions

Content Personalization

- **IMRF.org:** None
- **COMPASS:** Personalization is enabled through Staff Profile and department/team-specific content associated/added to staff profile

Integrations & Dependencies

IMRF.org and COMPASS have relatively limited integrations, including:

- Links to other content/sites/services (e.g., Links to our Portals, Vimeo via iframe or links)
- **Analytics:** Google Analytics
- **Search:**
 - IMRF.org: Google Custom Search Engine (simple search experience)
 - COMPASS: Apache Lucene with faceted/filter-based search
- **Email:** Web Forms for Marketers emails are routed through an on-premise email relay
- **Authentication:** COMPASS uses Active Directory for staff authentication
- **Security:** CSP Policy Headers are set to Report-URI for IMRF.org

IMRF is open to evaluating alternative platforms for:

- Analytics
- Search
- Forms
- Email delivery

Hosting, Environments, Architecture

Current Environment

IMRF currently maintains on-premises environments for:

Exhibit D

Key IMRF Information

- Development
- UAT
- Production

Architecture Overview

- A single Production Content Management (CM) server where Content Authors create/edit content for both IMRF.org and COMPASS.
- IMRF.org content is published to Content Delivery (CD) servers
- Production includes:
 - 2 load-balanced (via F5 BIG-IP) CD servers in DMZ
 - 1 CM server (used for COMPASS and staging)

Traffic & Performance

- IMRF.org: ~3,000 daily users
- COMPASS: ~300 daily users
- Expected traffic growth: increase to 4,500 daily on imrf.org
- Performance goal: current 1.5 second page load time, goal <1 second

Environment Considerations

- IMRF requires all environments as it is today (DEV/UAT/PROD model)
- Current DR strategy: Cold standby via VM restorations for all on-premises servers

Additional Notes

- Sitecore analytics and profiling features are not currently in use
- IMRF prefers U.S.-based resources
- IMRF is open to additional licensing costs/options that may be required for:
 - Hosting
 - DevOps / repositories
 - Managed services

Security

IMRF has the following security requirements:

- Ensure intranet (COMPASS) content and endpoints are not externally accessible

Exhibit D

Key IMRF Information

- Ensure restricted access to:
 - APIs
 - Environments
 - DevOps pipelines

By ensuring only authenticated users, keys, and/or by IP restrictions

- Enforce Content Security Policy (CSP) at the front-end (Next.js layer)

Platform Preferences & Considerations

- **Frontend Hosting:** Open to Vercel or Netlify
- **Search:**
 - Open to Sitecore Search or alternative solutions including Google Search
 - Preference for simple search experience (minimal or no faceting)
 - Note: Previous faceted search on IMRF.org was removed; COMPASS still uses facets/filters, but user feedback has indicated dissatisfaction with search results and facet/filtering experience

Migration Complexity & Technical Debt

IMRF's current platform presents several modernization considerations:

- Running on Sitecore XP 9.0.2, which is end-of-support and no longer patchable
- Use of Web Forms for Marketers (WFFM) instead of modern Sitecore Forms
- Legacy custom applications built using ASP.NET Web Forms (non-MVC)
- Limited adoption of modern Sitecore patterns (e.g., Sitecore Experience Accelerator)
- Historical reliance on a prior implementation partner for:
 - Ongoing support
 - Enhancements
 - Knowledge of the system

Accessibility

The following information is a summary of recent reviews that IMRF's UX Designer is conducting. The review activities will continue, and updates will be provided to the bidder as available.

Exhibit D

Key IMRF Information

Phase I Accessibility Focus (Public Website: Lift, Shift, and Improve)

In Phase I, accessibility efforts focus on establishing a compliant foundation as part of the lift, shift, and improve of the public-facing website, including implementing standardized, accessible templates with proper semantic structure and remediating critical interaction and visual accessibility gaps to meet WCAG 2.1 AA requirements. This includes ensuring full keyboard operability of all navigation and interactive elements (WCAG 2.1.1 and 2.1.2), providing clear and consistent focus states, enforcing accessible color contrast ratios (minimum 4.5:1 for body text and 3:1 for large text), and embedding these requirements within a design system using predefined accessible components and color tokens. The design system should enforce accessible color pairings, with primary usage of high-contrast combinations (e.g., dark blue on light backgrounds or white on dark blue). Accent colors (gold, green, teal) should not be used for body text unless contrast requirements are met. All components and templates should be built using predefined, accessible color tokens, if possible, to ensure consistency and compliance across the platform. Additionally, Phase I addresses issues related to content structure and responsive behavior (WCAG 1.3.1 and 1.4.10) by delivering responsive templates that maintain usability, context, and access across devices, ensuring accessibility is built at the component and template level as part of the platform migration.

Phase II Accessibility Focus (Intranet: Lift, Shift, and Improve)

In Phase II, accessibility efforts extend the same foundational approach to the COMPASS intranet as it is migrated, ensuring the platform meets WCAG 2.1 AA requirements while maintaining existing functionality as outlined in the RFP. This includes applying accessible templates, enforcing semantic structure, and ensuring keyboard accessibility and consistent interaction patterns across components, leveraging the template systems established in Phase I to support consistency and scalability. While responsive behavior is not required for the intranet, all other accessibility standards that are applied to the public facing website are included to ensure a unified and compliant experience across both platforms.

Phase III Accessibility Focus (Roadmap: Future Improvements)

Following completion of Phases I and II, accessibility efforts shift to the multi-year roadmap in Phase III, focusing on more advanced, content-specific and experience-level improvements that require alignment with content strategy and user research rather than

Exhibit D

Key IMRF Information

platform implementation. This includes addressing redundant links, improving labeling and content clarity, refining information architecture, and reducing cognitive load to support more intuitive navigation and task completion. Building on the accessible foundation established in earlier phases, this work introduces more intentional alignment between content structure, interaction design, and accessibility, with a focus on improving overall usability, reducing friction, and supporting long-term accessibility maturity.

IMRF Current Roles & Users

Role	Number of Staff in the Role
Developer	6
COMPASS admin	9
IMRF.org admin	7
Marketing (Sitecore tools)	3
Analytics (Sitecore tools)	3
COMPASS Verified HR (Handbook/Policies)	1
COMPASS General HR (Job Postings)	4
COMPASS Verified Legal (Board Resolutions)	2
IMRF.org Investments (investment asset page, non-RFP investments page, investment performance page)	3

Operating Model

The current operating model we are working with is Sitecore XP 9.0.2.

The license details are:

- Sitecore.NET 9.0.2 (rev. 180604)
- June 04, 2018
- Web Forms for Marketers 9.0.rev. 180503
- .NET Framework 4.0.30319.42000

Content Authoring and Administration

We will continue using the current vendor for development needs until migration is complete. At that point, we will work with the new vendor under a new contract. Web

Exhibit D

Key IMRF Information

updates and administration during and after migration will be completed by four members of the Communications team. Investments, Legal and HR also make updates.

Workflows

There are a variety of workflows. Here are a few:

- Investments updates page and submits for approval – send a request to approve the file – approve the file (twice) – Update is now displayed
- Board Resolutions – We update/build the page and submit for approval – Legal approves – Update is now displayed
- Employee Handbook Changes – We update the page and submit for approval – HR approves – Update is now displayed

Current Sitecore Licensing

- 2 Production Content Delivery servers (IMRF.org)
- 1 Production Content Management server (COMPASS + shared CMS)
- 2 non-production servers (Development and UAT)
- 15 concurrent content author licenses
- Bronze-level Sitecore support agreement

Server / VM Name(s)	Environment (Prod, Dev, QA, etc.)	Role (CM, CD, Reporting Services - xDB functionality)	How many Virtual processor Cores?	Sitecore version
Prd-stcrd-v1 Prd-stcrd-v2	Prod	CD	4	9.0.2
prd-stcrcms-v	Prod	CM	8	9.0.2
uat-siteinte-v	QA	CM/CD	4	9.0.2
dev-siteinte-v	DEV	CM/CD	4	9.0.2

Use of Artificial Intelligence (AI)

IMRF views the use of artificial intelligence (AI) as a powerful enabler based on specific use cases to improve the organization’s business processes. The risk of using various AI tools and technologies within IMRF's systems environment is highly dependent on, not only, the type of data that will be processed but the supporting security controls inherent within the proposed AI technology or solution. Therefore, IMRF retains the right to perform an

Exhibit D

Key IMRF Information

assessment of any purposed AI solution, tool, technology, or capability to assess the associated risks in support of the migration/upgrade activities along with any native capabilities of the platform or solution itself. IMRF will work with the selected partner to ensure that any associated risks are minimized to an acceptable level that meets IMRF's security standards and privacy guidelines.