

Dallas County Hospital District d/b/a Parkland Health & Hospital System (District)	
Request for Proposal (RFP)	
OUTSOURCED HUMAN RESOURCES ADMINISTRATION SUPPORT, REGULATORY COMPLIANCE, PAYROLL, and ASSOCIATED SERVICES FOR EMPLOYEE LOCATED OUTSIDE THE STATE OF TEXAS	
RFP-6542	Issue Date: 11/19/2015
Proposal Due Date: 12:00 PM CT, 12/10/2015	
Proposals received after the due date and time will not be considered by the District	
Contract Type: Single Award/Fixed Price Contract Term: 1 year + 1 optional renewal Project Budget: \$80,000 - \$100,000	Proposal Submission Instructions: You MUST be registered with District at https://supplierportal.pphhs.org Submit your electronic proposal to this RFP as required. A.) Submit one (1) stamped Original and seven (7) paper copies (8 Total Proposals) and One (1) pricing schedule separately sealed from the proposals to: Parkland Health & Hospital System Deborah Mitchell, Contract Negotiator II 8435 N. Stemmons Freeway, Suite 920 Dallas, Texas 75247 B.) Submit one (1) Electronic Copy of Response Documents (including the pricing schedule) to the Parkland Strategic Sourcing web portal: https://supplierportal.phhs.org . Upload files directly; do NOT "zip" the files. C.) Each page of the proposal must be numbered and indicate RFP-6542
Potential Offeror Presentation(s) may be required as part of the evaluation and may be included in the scoring process.	

1 SPECIAL INSTRUCTIONS

- A. Proposals should be submitted in accordance with the Instructions set forth in this RFP. District will evaluate proposals in accordance with the evaluation criteria in Section 5 & 6 and may issue one or more contracts as a result of this solicitation.
- B. Questions may be submitted in writing until 4:00 PM CT on 12/1/2015 to <https://supplierportal.phhs.org>. Answers to submitted questions will be posted on or before 12/3/2015.

No oral commitment, response, answer, or direction from other District personnel is binding unless also furnished in writing to all prospective Offerors by the District's Representative in the form of an amendment to this Solicitation, or as an official response to questions submitted by Offeror(s) through the Supplier Portal.

2 BRIEF DESCRIPTION OF PROJECT

The District seeks to identify a qualified vendor to provide Human Resources, administrative support, regulatory compliance, payroll, and associated services for full-time employees ("FTEs") who reside and work outside the geographic boundaries of the State of Texas.

The below signed, having authority to legally bind the below-referenced firm, hereby agrees to furnish and deliver the services identified in this RFP subject to the terms and conditions specified herein.

Signature	Company Name	Contact Telephone Number
Printed Name:	Date:	Email:
Title:		

3 INSTRUCTIONS TO OFFERORS

The following instructions will establish the format and content of proposals:

- A. **Proposal Cover Sheet:** The FRONT PAGE of this RFP shall be completed, signed, and submitted as the cover sheet ("the Cover Sheet") for Offeror's proposals. The Cover Sheet shall not count towards the page limit.
- B. **Authorized Official and Submission of Proposal:** The proposal must be signed by an official authorized to bind your organization and must stipulate that it is predicated upon all the terms and conditions of this RFP. You must provide responses to each requirement as to whether or not you can comply, and if you cannot comply you must explain why not.
- C. The proposal and other information related to how the Offeror intends to conduct the scope of work of this solicitation shall be submitted pursuant to the instructions of this RFP and shall address all of the items in the terms and conditions of Exhibit A, Contract for Services and Statement of Work ("SOW") in its Schedule C.
- D. **Related Documents:** The following documents are released as part of this solicitation package:
 - 1. **Exhibit A:** Contract for Services
 - 2. **Exhibit B:** M/WBE Participation Forms
 - 3. **Exhibit C:** Technology & Security Requirements
 - 4. **Exhibit D:** Pricing Schedule
- E. **RFP Qualifications & RFP Terms & Conditions:** Offeror's Services must meet all of District's Qualifications as set forth in Section 5, Pass / Fail Evaluation, and the Statement of Work set forth in Schedule C, of Exhibit A.
- F. **Vendor Credentialing:** The selected Offeror(s) for this procurement will be required to register with our vendor credentialing service, Symplr, at www.symplr.com within five (5) business days of the effective date of the fully executed contract. This service requires payment of a fee typically between \$149 and \$300 for registration.

This is a MANDATORY requirement and will not be waived.

Please Note: This requirement pertains to the Offeror itself and each Offeror employee providing services to the District under the definite contract.

- G. **Contract:** District has the option to award multiple contracts based on submitted proposals. Any resultant contract shall include the terms and conditions set forth by District in *Exhibit A*. **District is a political Subdivision of the State of Texas agency and therefore bound by State of Texas requirements and law.**

Offerors must provide written confirmation of their acceptance of Exhibit A, inclusive of its Schedule C – SOW at time of submission of documents. Please provide written confirmation in a separate document placed after the Cover Sheet.

TO ENSURE THAT THIS RFP IS BASED ON FAIR COMPETITION, THE CONTRACT TERMS AND CONDITIONS OF THE AGREEMENT ARE NON-NEGOTIABLE; HOWEVER, DISTRICT RESERVES THE RIGHT TO ALLOW NEGOTIATIONS IN THE EVENT NEGOTIATIONS ARE NECESSARY.

Failure to strictly adhere to this requirement may result in your proposal being eliminated from consideration.

- H. **Pricing and Potential Award Without Discussions:** Offeror should offer its best pricing in its initial proposal and such pricing should be valid for One Hundred Eighty (180) days. District reserves the right to award a contract without discussions if it is determined that the initial prices are fair and reasonable and that discussions to clarify requirements are not necessary.
- I. **References:** Offerors shall provide references as set forth in the RFP. It is Offeror's responsibility to ensure the reference's point of contact agrees to respond to District's specific questions regarding Offeror's experience and performance. References shall be capable of answering questions concerning Offeror's ability to deliver product and services relative to this RFP. Use of District personnel as references will NOT be counted towards the minimum reference requirements.

- J. M/WBE Representations and Certifications:** Offerors are encouraged to identify if they are a 51% or more minority or woman owned business. Note: District will require certification through an accredited certifying agency. The District Supplier Diversity Team is available to Offerors at 214-590-2371 or by email at MWBErequest@phhs.org. Please attach a copy of your certification with your proposal, if applicable.

All Offerors must complete all forms in Volume IV of this RFP whether you are a certified minority firm or not. Completion and submission of all forms in Volume IV will be considered your M/WBE plan.

- K. NO RIGHT OF CONFIDENTIALITY: DALLAS COUNTY HOSPITAL DISTRICT IS A POLITICAL SUBDIVISION OF THE STATE OF TEXAS AND AS SUCH, IS SUBJECT TO THE TEXAS PUBLIC INFORMATION ACT AND TEXAS OPEN MEETINGS ACT.**

- L. All communication regarding this solicitation must be directed to the Contract Representative noted on this document. Direct communication with any other District employee or its representative will be grounds for disqualification.**

- M. Administrative Remedies:** By submission of a response to this solicitation, Offeror agrees to exhaust its administrative remedies under Chapter 10 of the District's Purchasing Manual or the Disputes Clause of any resulting contract prior to seeking judicial relief of any type in connection with any matter related to this solicitation, the award of any contract, and any dispute under any resulting contract.

- N. Filing of Protest:** Protests of the award must be made in writing as follows:

Notice by E-mail to PROTESTS@phhs.org.

Alternatively, send a letter to the physical address below:

Attention: Director of Contracts
Contracts Department - Protest
8435 N. Stemmons Freeway, Suite 920
Dallas, Texas 75247

Protests must be filed in accordance with the stipulated procedures documented in Chapter 10 of the Dallas County Hospital District Purchasing Practices and Procedures Manual. A protest is considered filed when received at the e-mail address or physical address. E-mails will receive automatic replies if addressed correctly.

- O. Financial Reference:** The District may perform a Responsibility Determination. By providing a response to this solicitation, you agree to submit all documentation requested by the District to aid in its Responsibility Determination.

- P. District Background:** Parkland is a major economic engine for Dallas County. The hospital system employs more than 10,000 people. With more than 1 million total patient visits a year. Parkland serves as a safety net hospital, caring for needy people throughout the Dallas community. Parkland has trained half of the practicing physicians in Dallas County and we are the first and the busiest certified Level 1 Trauma Center in the region. 62 percent of the trauma cases in Dallas County come to District. Parkland is also home to the District Burn Center, the second largest civilian center in the U.S. where the standard in burn care, "The Parkland Formula," was developed.

Parkland serves as the primary teaching hospital for the University of Texas Southwestern Medical Center. More than 60 percent of the doctors in the Dallas area have undergone formal training at District. The hospital system boasts 10 Centers of Excellence with the most skilled health professionals and state-of-the-art tools and equipment. Additional information can be found at www.parklandhospital.com.

4 SELECTION PROCEDURES

- A.** This is a best value procurement where the District is permitted to make tradeoffs between cost or price and non-price factors and to consider award to other than the lowest priced Offeror or other than the highest technically rated Offeror. Proposals may be evaluated by an evaluation committee. After evaluating proposals, the evaluation committee may make the best value determination or a Source Selection Authority may be appointed to determine which proposal(s) represent the best value to the District. The District reserves the right to award multiple contracts or reject all proposals and cancel this Solicitation at any time. In addition to evaluating the information provided in each proposal, the District may reasonably consider information received from other

sources including but not limited to consulting firms, benchmarking firms, or any other outside entity.

- B. The pricing submitted with each Offeror’s proposal will be evaluated for cost reasonableness. Submitted prices will be evaluated to determine price reasonableness and unreasonably high or low prices may result in removal from the competitive range without further evaluation or consideration of contract award. Proposals may also be rejected for including prices beyond the District’s budget for the subject of this solicitation. District is a political subdivision of the State of Texas agency and is therefore exempt from taxes. Do not include taxes in your proposal pricing.
- C. District reserves the right to award a contract without discussions. If an award will be made without conducting discussions, Offerors may be given the opportunity to clarify certain aspects of their response (e.g., the relevance of past performance information and adverse past performance information to which Offeror has not previously had an opportunity to address) or to resolve minor or clerical errors in Offeror’s submitted documents.
 - b. If discussions are necessary, oral or written discussions will be conducted with all Offerors in the competitive range. The District reserves the right, to limit the number of proposals included in the competitive range to the greatest number that will permit an efficient competition. All aspects of the proposals may be subject to discussions, including cost, technical approach, past performance, and contractual terms and conditions. At the conclusion of discussions, each Offeror still in the competitive range may be given an opportunity to submit a written Final Proposal Revision (FPR), or Best and Final Offer (BAFO).
 - c. District reserves the right to conduct finalization of details with the selected source after receipt of the final proposal.
- D. **Awards.** The District reserves the right to make a single award, multiple awards or no award at all to the RFP. In addition, this RFP may be amended as necessary to meet the needs of District or canceled by District at any time for any reason or no reason.

Notice of Award shall be the earlier of the following: (1) the date the contract approval document is posted publically on the District’s website in advance of the District’s Board of Managers meeting, or (2) the date the District emails the Notice of Award Letter. It is the Offeror’s responsibility to monitor the District’s website for contract approval document postings. Offerors are deemed to have constructive notice of all information posted on the District’s website including information posted in the following locations:

<https://supplierportal.phhs.org/Improd/SourcingSupplier/controller.servlet?dataarea=Improd&context.session.key.SupplierGroup=PHHS>

5 PASS/FAIL EVALUATION

The following are required Offeror qualifications and will be evaluated on a pass/fail basis. Please indicate "yes" or "no" by responding to the following chart:

PASS OR FAIL		YES/NO
1	The Offeror must have PHR (“Professional in Human Resources”) / SPHR (“Senior Professional in Human Resources”) on management and customer call center team.	
2	The Offeror must be appropriately licensed for tax compliance in all federal and state jurisdictions.	
3	The Offeror must be in business in cloud-based payroll software for a minimum of five (5) years.	
4	The Offeror must be able to conduct two-way data exchange with our PeopleSoft system in order to import and export key human resources tracking data.	
5	The Offeror’s system must be compatible with Success Factors Talent Management System including their learning management system (“LMS”), Performance Management, Applicant Tracking System, and overall system to include two-way communication as required.	
6	Offeror must accept all items that Offeror feels is applicable to this solicitation in Exhibit C :	

	<p>Technology & Security Requirements.</p> <p>Offeror must respond as indicated to each item in Exhibit C and return in its entirety as a separate document as part of the proposal package.</p> <p><i>Please note: District reserves the right to determine which items are applicable to this solicitation and based on information received will determine if Offeror passes or fails this required qualification section.</i></p>	
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If Offeror answers "No" to any of the above qualifications, Offeror may be deemed to have not met the minimum qualifications and may not be considered for Evaluation.

6 EVALUATION CRITERIA AND RELATIVE WEIGHT

Evaluation factors are listed below and are assigned the indicated percentage weights which represent the overall importance for consideration.

Evaluation scores will be based on the following point system: One (1) point for each percentage weight as assigned below.

Technical Experiences	Past Performance	General Requirements & SOW	M/WBE Participation Plan	Pricing
30% (30 points)	25% (25 points)	20% (20 points)	Evaluated but not weighted or scored	25% (0 points)

Pricing is not scored in the competition.

7 PROPOSAL FORMAT

Please submit proposal(s) in accordance with the following instructions:

- Proposals shall be divided into five (5) volumes and may not exceed seventy (70) overall total pages inclusive of Exhibit C:
 - Volume I: Technical Experiences
 - Volume II: Past Performance
 - Volume III: General Requirements & SOW
 - Volume IV: M/WBE Participation Plan
 - Volume V: Pricing **(The Pricing Volume will be submitted separately in a sealed envelope. Pricing will be weighted but not scored.)**
- All Volumes of this RFP MUST be completely addressed.
- Margins shall be set 1 inch at the top and bottom and .5 inch on each side and must be 12 point Times New Roman type font.
- Volumes shall be contained all in one (1) binder (no spirals) and separated with a divider tab with the exception of Volume V which will be presented as instructed above.
- Offeror's responses SHALL correspond with each number and subsection of applicable volume.

8 PROPOSAL INFORMATION

A. Proposal Objectives:

- Lower the cost of labor by employing fully badged employees located outside the State of Texas in any of the other 49 U.S. States. This virtual workforce of full time employees (FTE) would operate at a lower cost than contractors and offset the skilled coder labor shortage in Texas.
- Increase retention and complex medical case coding expertise by employing full time employees who are incentivized to work at Parkland Health & Hospital System for a longer period of time than contractors.
- Reduce the error rates associated with contractor or transitional workforces.

For each section and subsection of each volume below, describe in detail how your company will meet and or exceed the following items listed.

If presentations are required, they will be factored into the scoring.

A. Volume I: Technical Experiences – (30 points)

1. Provide a minimum of five (5) project examples performed within the past three (3) years, evidencing your experience and ability to perform the services set forth in Schedule C - Statement of Work, in a hospital or other facility similar in size and scope to the District. Provide the following information for each project sample:
 - a. Project Title & Location
 - b. Project description scope to include size of facility
 - c. Project start and end dates
 - d. Prime Contractor performing work (if Offeror was not Prime Contractor performing the work)
 - e. Sub-Contractor(s) performing the work to include type of work
 - f. Contract value/actual award amount
 - g. Point of contact name, address, telephone and facsimile number, e-mail address
 - h. Problems encountered and corrective actions taken if any

B. Volume II: Past Performance – (25 points)

1. Provide five (5) references that best represent the Offeror's past performance. Projects performed with and/or for the District will not be counted towards this requirement. These references should primarily come from the projects provided in response to Volume I. Offerors should provide references in narrative form and address each of the bullets below. All points of contact should be verified by the Offeror prior to submission as part of Offeror's proposal. Points of contact shall be knowledgeable of past performance from a contractual, managerial, and technical perspective.
 - a. Company Name
 - b. Project Name
 - c. Contact Information (Name, Address, Telephone #, Email)
 - d. Description
2. Describe in full detail at least three (3) "lessons learned" from prior projects that are similar to the services required in this RFP.
 - a. Project Name and/or Description
 - b. Issues
 - c. Solutions
 - d. Other Information

C. Volume III: General Requirements/SOW/Optional Features – (20 points)

1. General Requirements - Corporate Structure & Service Provided

Explain the following areas of your corporate structure to allow the District to better understand how your company will perform the Statement of Work set forth in Schedule C and as further indicated below:

a. Ownership Structure

i. General Overview

- 1) State the location of your company's headquarters

- 2) Name the awards that your company recently acquired
 - 3) Name the required licenses that your company holds
 - 4) List the number of your employees across all locations
 - 5) Describe your position as a public or private company
 - 6) Please describe what distinguishes your company from the competition and describe the state of your employee relations
 - 7) Describe the locations of your support employees
 - 8) Describe any product development that takes place outside of the U.S.
 - 9) Describe your entire hosting and service delivery infrastructure located within the U.S.
 - 10) List how many your number of payroll clients
 - 11) Provide the number of payroll checks that you process, per week, for your clients
 - 12) Describe your primary business focus
 - 13) Describe the average number of employees of your clients
 - 14) Describe any recent changes (mergers, acquisitions, divestitures) that have occurred in the past two years, or will occur within the next year, which will affect how you deliver service
 - 15) Provide a description of your organization, including the area devoted to developing and supporting the product being proposed to our company
 - 16) Describe which of your offerings produce the majority of your new sales revenue
 - 17) Describe your market share in the payroll software and service arena
 - 18) Describe your company's account management service philosophy and approach.
- ii. Business History, Process, and Procedures that will ensure successful contract performance
 - iii. Background of Corporate Officers
 - iv. Resume for Offeror's Proposed PHR and/or SPHR
 - v. Proposed Team (teaming arrangements, joint venture partners, key subcontractors to be utilized in performance of contract)
 - 1) Explain the role of each member of the team
 - 2) Explain how each member will contribute to successful contract performance
 - 3) List previous projects where each member has contributed to performance of contract
 - vi. Past or Pending Litigation against Offeror within the past four (4) years

b. PROJECT MANAGEMENT and IMPLEMENTATION PLAN

Provide a Project Management Plan for the oversight and successful performance of the services identified in Exhibit A, Schedule C - Statement of Work ("SOW"). The Project Management should include but is not limited to the following items:

- i. Implementation Plan that includes detailed timeline with identified milestones for fulfilling all requirements in SOW
- ii. Key roles and responsibilities for successful contract performance and the personnel the Offeror intends to perform these
- iii. How Offeror will manage the work and ensure successful contract performance
- iv. How Offeror will provide training and technical support

2. Statement of Work (SOW)

Address all sections of Schedule C - Statement of Work and identify where you meet or exceed the requirements with detailed explanations of how you will perform each section.

{Schedule C: Statement of Work (SOW)}

a. Contractor Services

- i. Services must deliver the following functionalities:
 - ii. A highly secure, web-based portal accessible 24/7 with 99.5% uptime that provides workers the ability to track hours, see a virtual copy of their pay stub, make simple payroll changes, and access required training and compliance modules. Said portal must provide access for managers to review their direct reports and provide a feed to District's PeopleSoft system.
 - iii. Automatically update to assist interface payroll systems, PeopleSoft, at minimum once every twenty four (24) hours and meet all security requirements dictated by District's Information Technology Department. Ability to provide two-way communication.
 - iv. Assist with District's quarterly IRS Form 941 updates.
 - v. Interface with Milliman's benefits portal if necessary.
 - vi. Provide payroll assistance to include the following:
 - 1) state by state compliance assistance with tax filings and withholding
 - 2) direct deposit and paper check options
 - 3) state unemployment insurance including live assistance to respond to questions
 - 4) garnishment services
- b. Web-based, regulatory compliance such as mandatory sexual harassment training that complies with each state's laws, unemployment filings, workplace safety, and human resources advisory.
- c. A support line and resources available for technical and administrative, especially human resources, with at least 18 hours a day availability and preferably 24 hour support. HR support services and policies should be vetted at least annually by a nationally known law firm and the firm should be identified to District. An example of a nationally known firm would be Fisher and Philips or Jones-Day.
- d. Customized employee handbooks via online means tailored to District's specific policies and procedures.
- e. Specialized employee and manager training including but not limited to:
 - i. Alcohol and drug free workplace
 - ii. Americans with Disabilities Act
 - iii. Avoiding Employment Discrimination
 - iv. Being an Effective Team Member

- v. California and Connecticut Sexual Harassment
 - vi. California's Leave Laws
 - vii. California's Wage and Hour Laws
 - viii. Conflict Resolution
 - ix. EEO and Affirmative Action
 - x. Non-harassment and workplace violence
 - xi. Workplace Diversity
- f. Electronic and hardcopy (by exception) Workplace Management Forms
- i. Payroll deduction authorization
 - ii. Time card exception report
 - iii. Position/Rate change form
 - iv. Employee incident report
- g. Employee separation assistance for voluntary and involuntary including COBRA administration, specifically:
- i. Verify state specific COBRA requirements
 - ii. Assist in completing state by state documentation
 - iii. Exit interview guidance
- h. Safety and loss control assistance to include state safety manuals and OSHA Compliance.
- i. Retirement services such as a 401(K) defined contribution program
- j. An IRS Section 125 Flexible Spending Account with live support for employees.
- k. System Account Management and Customer Support**
- i. System must deliver the following functionalities:
 - ii. Audit trails on all fields that track changes made, by whom and when
 - iii. Financial stability
 - iv. Organizational commitment to the solution
 - v. Reporting — ad hoc and customized
 - vi. SAS 70 Type I Certification
 - vii. SAS 70 Type II/SSAE certification
 - viii. Single data repository
 - ix. SSO — Single Sign On
 - x. Training included in implementation and ongoing as needed
 - xi. User-defined fields
- I. System Payroll Functionality**

- i. System must deliver the following functionalities:
- ii. Payroll module support that can create new earnings codes at any time
- iii. Payroll software support job costing and labor distribution functions.
- iv. Payroll software support entering future and prior dates for pay changes
- v. A clearly defined payroll process approved by the District
- vi. Software support a program to run online payment modeling without running a batch
- vii. Software that automatically increases salary and makes mass salary changes
- viii. System to make corrections to payroll errors
- ix. Payroll system to allow for the payment of bonuses including tax deduction options
- x. Garnishments
- xi. Multiple deduction codes
- xii. Time punch data and PTO accruals to print on paychecks
- xiii. Audit trail for voided checks
- xiv. Manual checks to be issued after payroll is run
- xv. Run multiple checks for an individual employee during a pay cycle (paycheck and vacation check)
- xvi. Software interface with our general ledger corresponding GL reports as requested
- xvii. Data available for inactive employees, including but not limited to terminated employee preserved in system to enable fiscal year reporting
- xviii. Payroll completed in "real time" with ability to preview payroll nearly instantaneously
- xix. Employees download their Forms W-2, view paystubs, and update tax information online
- xx. Track time records without a rate of pay
- xxi. Allow for either a percent or a flat dollar amount to be applied to payroll deduction
- xxii. Direct deposit
 - 1) Multiple employee accounts allowed
 - 2) Electronic transmit to the bank
- xxiii. Reporting payroll totals by cost centers
- xxiv. Direct deposit overridden when processing an off-cycle vacation check
- xxv. Deduct PTO hours taken through payroll processing from the balance of PTO available to the employee

- xxvi. Keep a current balance of available vacation hours
- xxvii. Void a check
- xxviii. Payroll processing audit procedure to include pre-edit reports
- xxix. Software support changing hours worked while processing payroll for salaried employees
- xxx. Vendor/Client year-end and/or year begin process as agreed and approved by District
- xxxi. Print and produce Forms W-2
- xxxii. Payroll checks, tax payment and direct deposits to be issued directly from the vendor's bank
- xxxiii. Funds pulled from user account to pay taxes or payroll in a time agreed and approved by District.
- xxxiv. File all quarterly and annual tax returns and make all tax payments for the client
- xxxv. Prior year payroll and tax data included in initial import of data during implementation of the service
- xxxvi. Multiple years of payroll and tax data maintained and viewable in system
- xxxvii. System create and handle multiple schedules at a time
- xxxviii. Mobility options to include payroll information from a smartphone or tablet
- xxxix. Management of one-time exceptions
- xl. Year to year payroll managed calendars
- xli. Platforms that run on Windows/MSFT compatible
- xlii. Expense reimbursements processing
- xliii. Manual checks
- xliv. Benefit and time summary on paycheck
- xlvi. Retaining data within system, maintained for no less than two years
- xlvi. Employee changes future dated
- xlvii. New hire reporting
- xlviii. Payroll funds withdrawn from vendor's account one (1) business day prior to payday
- xlix. Robust reporting engine and functionality

m. System Reporting Functionality

- i. System must deliver the following functionalities:
- ii. Standard Reports
- iii. Standard reporting tool included with your software application

- iv. Customized reports
- v. Software that provides access to information in a module without closing the current application or exiting the current module
- vi. Flexibility in creating or generating report
- vii. Auto-generating reports
- viii. System with “wizards” to walk users through running reports
- ix. Training for custom report writing
- x. Assistance in building more complex reports
- xi. Reporting capabilities:
 - 1) Custom and standard reporting (i.e. reports that show changes that took place in the system per payroll processing)
 - 2) Exporting file format capabilities
 - 3) When creating reports and selecting parameters/filters will user be able to see parameters in the report
 - 4) Ability to run reports on date specific criteria, i.e., past, present, future and or ranges of dates

n. System Human Resources Functionality

- i. System must deliver the following functionalities:
 - 1) HR solution serves employees in multiple location
 - 2) System reduces paper and duplicate data entry
 - 3) HR solution integrates with payroll
 - 4) System maintains personnel change history
 - 5) Maintaining histories of current and former employees
 - 6) Annual performance reviews processing
 - 7) HR software identifies overdue reviews and brings past due reviews current
 - 8) Software provides EEO reports
 - 9) Software generates OSHA compliance reporting
 - 10) Software tracks accidents, injuries, and work restrictions
 - 11) Coordinates with other workers' compensation systems for claims processing

- 12) Software tracks employee disciplinary action
- 13) Moving information from applicant data to employee master record data upon hire
- 14) Software maintains benefit information, such as effective dates, eligibility, dependents, beneficiaries, and termination
- 15) Software tracks each employee's completed training, new skills acquired, and any expiration date of these skills
- 16) Self-registration for training by employees
- 17) Software tracks credential requirements with automatic filtering for applicants
- 18) Employees ability to emergency contact information via self-service
- 19) System tracks FMLA and other leaves of absence
- 20) System presents updates based on state law changes
- 21) Live HR Support Services with PHR (“Professional in Human Resources”) / SPHR (“Senior Professional in Human Resources”) or SHRM-CP / SHRM-SCP certified respondents

o. System Recruitment Functionality

i. System must deliver the following functionalities:

- 1) Application has task checklists for HR and Managers with the ability to check off tasks as completed when hiring or rehiring employees
- 2) Application automatically notifies other areas of the organization (security, payroll, etc.) when there is a new hire
- 3) Application allows user to enter the new hire before the start date (effective dating) even though the new person will not appear on the organizational chart or reports until the effective start date
- 4) Application hires both regular employees and contractors
- 5) Communications can be sent and received via the application
- 6) Application allows for pre-population when resumes are uploaded
- 7) Online forms
- 8) Separate reporting capabilities for the recruitment, i.e. applicant log, days to fill
- 9) System shall assist with regulatory requirements.
- 10) Application allows for third party submittal
- 11) System tracks employee referrals

- 12) Candidates can be attached to more than one job requisition
- 13) Specify job boards for posting
- 14) System/application will integrate with the corporate website
- 15) Job-posting portal
- 16) System will match applicants to job requisitions
- 17) System application assessment capabilities
- 18) Application allows for auto scheduling of interviews.
- 19) Software schedule applicant interviews for internal and external candidates
- 20) System/application manages candidates through the recruiting process
- 21) Standard job template listing or library is built into the functionality of the requisitions
- 22) System/application allows for requisition approval functionality
- 23) Job descriptions are tied to requisitions
- 24) Functional privileges are assigned based upon user, user group and location
- 25) System/application allows for an interface (resume view) for non-users
- 26) Security and user authentication
- 27) Applicants access the system to modify or replace existing resume.
- 28) Applicants track the status of his or her application
- 29) Applications provide retention of all applicant information pursuant to statutory requirements
- 30) Users transfer the selected applicant's data from the online application to the employee and talent databases
- 31) Recruiting
- 32) Recruiting solution works with Social Media sites
- 33) Labor tracking and analytics

p. System Onboarding Functionality

- i. System must deliver the following functionalities:
 - 1) Onboarding module
 - 2) System/application has the ability to output a well-formatted completed form to hard copy print
 - 3) Hires can return and update/correct their information after the initial submission
 - 4) Monitor overall status of the onboarding process, providing a clear indication of "new hire readiness"

- 5) Pre-populates form fields for the W-4, I-9 forms as part of the standard solution.
- 6) Pre-populates custom forms
- 7) New hire automatically closes the open requisition

q. System Time and Attendance Functionality

i. System must deliver the following functionalities:

- 1) Screen available to show employee attendance details
- 2) Designated manager/supervisor can add or modify absence information
- 3) Standard reports are available to track employee lost time, new hires, and terminations
- 4) Software tracks different vacation policies under one company with different locations
- 5) Software can track time accrued, taken, available, and carry-over
- 6) System links to third-party time and attendance solutions
- 7) Software interfaces with time clocks and errors are handled and reported.
- 8) Data loss prevention
- 9) Time clocks that are supported shall be agreed and approved by District
- 10) Mobile solution for Time and Attendance
- 11) Geolocation /Geofencing with Time and Attendance solution
- 12) Ensure compliance with individual state time and attendance policies

r. System Health & Benefits Functionality

i. System must deliver the following functionalities:

- 1) Payroll system integrates with benefits
- 2) Exports benefit information to carriers
- 3) Upgrades system for future governmental compliance and reporting
- 4) Benefit plans are set up so that only a specific group of employees are eligible for them
- 5) Benefit cost changes can be future dated for a future date in the current year
- 6) Premiums automatically updated for age and salary increases
- 7) Insurance amounts are automatically adjusted when a salary increases
- 8) Automatic enrollment for a certain group of people in a benefit plan
- 9) System provide Employee Benefit Statements
- 10) Online benefit enrollment

- 11) System/application includes benefit premium reports
- 12) Benefits enrollment
- 13) Benefit election changes update payroll deductions
- 14) System allows mass changes in benefits
- 15) Software tracks the number of dependents on each employee benefit contract including names and the relationship to the employee
- 16) Software tracks an unlimited number of benefits
- 17) Employee contributions flow to payroll for both pre- and post-tax deductions
- 18) Standard reports are available
- 19) Software provides modeling capabilities for 401(k) contributions online without batch runs and through self-service
- 20) Software provides the ability to track and report on terminated, vested employees.
- 21) Software provides the ability to define and track childcare and medical reimbursement Section 125 plans
- 22) Benefit tables/rates are managed from year to year with changes to rates or specs

s. System Self-Service Functionality

i. System must deliver the following functionalities:

- 1) Applications are role-based rather than based on specific job functions
- 2) Self-service system is user friendly
- 3) Application has employee self-service functionality
- 4) Employees monitor their paycheck online for changes including deductions, marital status, and exemptions
- 5) Employee self-service feature will assist in the communication between the company and employees
- 6) Employees view and update their direct deposit distribution and set effective date
- 7) Employees view benefit information including current benefit elections and employer contributions by code
- 8) Employees participate in an electronic open enrollment
- 9) Employees can view all eligible plans, choose their benefit plan and coverage option, and request time off from their manager
- 10) Self-service provides online entry for:
 - a) Certifications
 - b) Dependents

- c) Education
- d) Emergency Contacts
- e) Leave Balances
- f) Personal Profile
- g) Skills

11) Information is made available to employees, reducing the number of calls to human resources and payroll

- a) Self-service supports online time entry information:
- b) Daily
- c) Per pay period
- d) Time reports
 - a. Managers are limited to information for only their direct reports (or within their organizations)
 - b. Manager self-service application integrates with HRIS/payroll software
 - c. Application provides manager access to the entire employee self-service functionality
 - d. Self-service solution provides dashboard-type functionality for managers:
 - i. Display data based on custom queries (e.g., show total staffing costs for manager's employees)
 - ii. Set conditional alerts (e.g., when any of manager's employees approach OT)
 - iii. Display forms and/or workflows started or pending action

t. System Implementation and Training Overview

- i. System must deliver the following functionalities:
 - 1) System Implementation plan as agreed and approved by District.
 - 2) Educational/training options for software
 - 3) Standard and customized training programs, curriculum, and delivery methods
 - 4) On-going and turnover-based training available
 - 5) Complete training manuals available online
 - 6) Training department embraced new technology as it relates to curriculum development and delivery

{End of Statement of Work}

3. Optional Features

- a. Please list any other value-add options that were not previously addressed and which you would like to present to the District.
- b. The Contractor shall furnish details of any specific features, not mentioned above, that are unique to the proposed products and services and which provide competitive advantages in the acquisition of the products and services.
- c. If these items are not a part of the quoted products and services, include them as available options with line items pricing in your response to Exhibit C. Any additional responses in Volume III may be added to the Statement of Work, Schedule C, if necessary.
- d. Please note: In the event Offeror proposes services that exceed or are determined to be a benefit to the District and to the RFP project, District has the right to incorporate responses directly into the definitive contract set forth herein as Exhibit A.

D. Volume IV: M/WBE Participation Plan (completion of the required forms)

1. Offeror's Plan will be evidenced by completion of the attached forms. The Plan will be reviewed and determined to be "Acceptable" or "Unacceptable". If no M/WBE opportunities exist, such as 100% self-performance, it shall be noted in the completed forms. Plans in which no M/WBE opportunity exists will not be automatically deemed "Unacceptable" as long as ALL FORMS ARE COMPLETED.
2. The established M/WBE participation goals for Parkland are currently 25% for goods and services and 30% for construction. The percentage goal is an expression of total dollars paid by the District under the awarded contract resulting from this Solicitation. Offeror's Plan (comprised of the completed forms) shall detail and describe what Offeror can reasonably achieve for this specific procurement. If the work detailed in Offeror's proposal will be self- performed in its entirety, it shall be noted on the attached forms. All submitted forms will become Schedule H-17 to the Contract.
3. Offeror must complete ALL required forms in their entirety, including signature, to be considered "Acceptable".
4. Exhibit B.1 - M/WBE Subcontractor/Supplier Participation Form. **All Offerors** must complete this form, detailing all subcontractors/suppliers that will be part of the work performed. The expected value of the subcontractor/supplier portions of the award should be specifically noted so that the Supplier Diversity Team can accurately determine the percentage of the M/WBE participation.
5. Exhibit B.2 - M/WBE Good Faith Effort Form. **Offerors unable to meet** the established participation goals for this procurement (as submitted in Exhibit B.1) must complete this form to document the steps taken to solicit M/WBE participation prior to submitting the proposal.
6. Exhibit B.3 - M/WBE Post Award Participation Form. **All Offerors** must complete this form, detailing the steps that an Offeror would take if (1) the Offeror's proposal is accepted and (2) an opportunity to include M/WBE participation presents itself after such acceptance. In other words, Offeror shall detail a plan the Offeror will use to ensure that any contracting or subcontracting opportunities are made available for M/WBE participation.
7. Follow all directions included with or on the Forms attached to this Solicitation. Seeking assistance from the Supplier Diversity Team in completion of the forms will not be construed as Discussion or receiving an unfair advantage in relation to this Solicitation.

E. Volume V: Pricing – (Not Scored)

1. Please provide pricing using Exhibit D to the RFP to include the following:
 - a. In Excel format, provide pricing for all applicable costs associated with this solicitation. This Agreement is all inclusive.
 - b. Pricing in Exhibit D should be for a one (1) year base period plus one (1) one-year option period.
 - c. Include pricing for "options" if applicable in Exhibit D.