Fresno **Economic Opportunities Commission**

REQUEST FOR PROPOSAL
For
Human Resources Management Information System
Bid Number: 030118

March 15, 2018

Fresno Economic Opportunities Commission (Fresno EOC) is soliciting proposals to establish a contract with one (1) qualified and experienced human resources management information systems vendor to provide a single, robust integrated enterprise Human Resources Information System (HRIS) solution. This solution would cover all key areas such as employee information management, benefits management, talent acquisition, payroll services, and timekeeping. The current vision is to migrate from cloud based HRIS solution to a solution more aligned with the structure and functionality of Fresno EOC and its programs.

Proposals will be considered from qualified and experienced firms who are regularly established in the business of providing HRIS, and who in the judgment of Fresno EOC are financially responsible. Through prior work performed, firms must be able to show evidence of reliability, capability, experience, and knowledgeable personnel to perform the services.

You can also find this Request for Proposals (RFP) on the Fresno EOC website homepage www.fresnoeoc.org.

Proposal Submission:

- Qualified firms are invited to submit a proposal (an original and four (4) hard copies) meeting the requirements described herein must be received no later than **2:00 p.m. Thursday, March 15, 2018.** Mail or deliver hard copy proposals in a sealed envelope clearly marked in the lower left-hand corner with the following information:

  Fresno Economic Opportunities Commission
  ATTN: Greg Streets
  1920 Mariposa Mall, Suite 320
  Fresno, CA 93721

- Submit a digital proposal in pdf format to: greg.streets@fresnoeoc.org with a subject line: HRIS RFP 021518

Failure to clearly label proposals may result in premature disclosure of your proposal. It is the responsibility of the Bidder to insure that proposals are received by the above deadline. Late proposals will not be considered.

Questions:
Direct all questions regarding this RFP to Greg Streets via email: greg.streets@fresnoeoc.org. All questions and responses are public and posted in a timely manner on the Fresno EOC website homepage (www.fresnoeoc.org) under the RFP section. Fresno EOC will not accept questions after Thursday, March 1, 2018.

This Request for Proposal does not commit Fresno EOC to award a contract or pay any costs incurred in the preparation of a proposal in response to this request. Fresno EOC reserves the right to accept the proposal that it considers to be in its best interest. Fresno EOC will be the sole judge in making this

determination. All materials submitted to Fresno EOC by firms in response to this RFP become the sole property of Fresno EOC and will be used at its discretion unless the proposer identifies any trademarks or patents that protect products submitted. Selection of the firm is at the sole discretion of the Fresno EOC Board of Commissioners.

Thank you for your interest in working with Fresno Economic Opportunities Commission.

Brian Angus, Chief Executive Officer
Fresno Economic Opportunities Commission

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Fresno Economic Opportunities Commission (Fresno EOC) is soliciting proposals from qualified and experienced HRIS vendor to provide a single, robust integrated enterprise HRIS solution for Fresno EOC. Vendors must demonstrate the ability to perform the work described in the Scope of Services and have significant experience to perform the outlined work successfully. Periodically, Fresno EOC carefully explores and considers all service provider options with the goal of adequately protecting the Agency from risk exposures within the limitations of available funding. Services to be performed include procurement of HRIS systems, plan structure recommendations, implementation and migration of current/historical employee data, benefits assistance, interface to existing NOVATime Timekeeping software preferred (or alternate like timekeeping system), and performing occasional other studies.

About Fresno Economic Opportunities Commission (Fresno EOC):

Fresno EOC is a non-profit community benefit corporation organized under section 501 (c) (3) of the internal revenue code. Fresno EOC is part of a large network of Community Action Agencies authorized by the Economic Opportunities Act of 1965. Governed by a board of 24 commissioners representing the various regions of our county, its elected representatives, and organizations serving the poor, Fresno EOC has over the past 52 years emerged as one of the premier Community Action Agencies in the nation operating approximately 30 programs directed towards the needs of, and empowering the poor in our community. Fresno EOC employs approximately 1,200 individuals.

Response Format:

Responses should be concise and include the materials which are requested within this RFP. Generic marketing and promotional materials are neither required nor desired. Responding brokers should concisely but completely describe the scope of services they feel are appropriate to Fresno EOC and its affiliate entities.

Background on current coverage / plans:

Fresno Economic Opportunities Commission currently offers medical, dental, vision, disability and life insurance to eligible employees. Our medical, dental, vision and pharmacy plans are self-funded programs; our group life, disability and voluntary benefits are fully-insured

Scope of Service

1. Human Resources Information System
    a. Access, Design, Convert, Implement, and Train on new system
    b. In-house solution vs. SaaS (Software as a Service) solution
    c. Track all staff, clients working for EOC
    d. Transfer existing HRIS data from Ascentis to new system
    e. Employee Self Service
    f. Manager Self Service
    g. Benefits

h. Performance Management
i. Recruiting
j. Training Management
k. FMLA Tracking
l. Reporting
m. In the event, HRIS and Payroll services are not consolidated, a description of the process and costs to interface HRIS system to our payroll system is needed. Fresno EOC uses NOVATime Timekeeper Software by Ascentis Payroll Services.
n. Assist in the development with interfacing to payroll system
o. Provide technical support for interface to payroll system

2. Payroll Services
   a. Real Time Processing: Prepare, calculate, sign, stuff, distribute, and deposit approximately 1300 biweekly payroll checks. Approximately 75% are currently direct deposit. The system must provide online payroll information and manual check preparation capabilities. Ability to have remote processing as part of disaster planning procedures.
   b. Prepare and file monthly, quarterly, and annual payroll tax reports and prior quarter adjustments when required. Maintain accrual of payroll tax liabilities for direct deposit to tax agencies.
   c. Provide standard payroll reports, including specific reports:
      i. Labor distribution by program. Must have ability to allocate labor and "all" employer benefit costs at the "program" level as a percentage of wages charged to the program.
      ii. Workers compensation premium report. Must be able to calculate the premium due for each workers' compensation code provided. This is used to pay the premium and allocate the cost at the program level.
      iii. Benefit accrual reports by program. Must be able to allocate the cost of employer provided benefits at the program level.
      iv. Other program allocation reports as required.
   d. Provide the ability to self-prepare non-specific reports using a report writer.
   e. The Payroll Service is to provide for fraud protection services by transmitting a "positive pay" file on all checks written to Wells Fargo, Fresno EOC's financial institution containing check number, check amount, and payee. Provide description of the process and costs to administer child support, tax levies, and wage garnishment services. Fresno EOC requires up to 20 earnings codes and 35 deductions in its payroll. Provider will maintain accruals, generate payments (check or electronic) to be remitted to third parties and provide support detail.
   f. Provide customer support services to our payroll office as required.
   g. Provide a description of the process and costs related to the time keeping systems necessary to implement your payroll system without the time and attendance system
   h. Payroll and Financial services are not consolidated; a description of the process and costs to interface Payroll system with our financial system is needed. Fresno EOC uses

Blackbaud Financial Edge software.

3. General Ledger Upload
    a. The bidder is to provide for a method to prepare the detail upload to our general ledger. Fresno EOC uses "Blackbaud – Accounting for Non-Profits" for its general ledger. Describe in detail the process to accomplish this requirement. Blackbaud can accept flat file or CSV file transfers.
    b. Include a proposal for an "automated" upload from your payroll files directly to our general ledger if possible.
4. Time and Attendance System
    a. Is your software compatible with NOVATime Timekeeper software? If so, how does the system interface with NOVATime?
    b. As applicable, also provide proposal for implementation of a time and attendance system. Include a description of the process and costs of the components i.e. software, hardware, installation costs, etc. required for implementation.
    c. Provide pricing options for the ownership and maintenance of the time and attendance system.
    d. Provide time collection options and costs for such items as badges, cards, scanners, smart phone apps, computers, etc.
5. Pension Administration and Accounting Services
    a. Ability to run, or create, a remit file to our third party retirement plan administrator each pay period to include items such as contributions, hours worked, wages, and demographic information.

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Additional Questions:

Finance

1. Is employee # the key driver associated with each employee for look-up, sort, grouping features, etc.?
2. What linkage is built-in to the software to align the project cost codes for payroll allocation and groupings with a time keeping software (NOVATime), such as a "home department"?
3. What capabilities are there for storing/processing personnel time allocations for Exempt (daily rate) and Non-Exempt (hourly) employees?
4. What are the capabilities to incorporate and store historical information for:
    a. Employer information – Pay History
    b. Employee self-service – Check and W-2 history
5. How does information flow between HR and Payroll areas?
    a. Does this differ when handling updates of existing information versus entering new information?
    b. What data transfers from HR into Payroll and/or what information does not automatically do so?
    c. How are HR and Payroll data linked? Is this a "real time" update or an import function? Does the import happen automatically at end of each day or is there a manual process required? What is the frequency?
    d. What Audit Trail information is stored within the system for changes made by either HR or Payroll? Who is able to see the audit trail for changes in either area?
6. Pay Rates:
    a. Exempt positions are paid with a daily rate and non-exempt positions are paid with an hourly rate. This affects the rates of accruals for items such as vacation, sick, PSL. Are there any limitations to doing this?
    b. What is the capability to assign pay rates to specific dates, such as when a Temporary Pay Rate (TPN) either starts or ends in the middle of a pay cycle?
    c. What are the pay rate storage capabilities? Can an employee have multiple pay rates associated with them? Is this answer the same or different between the HR system and the Payroll system?
    d. Who is allowed to change and to view rates? How do pay rates flow between HR, Payroll, and time keeping systems?
    e. Provide the maximum number of pay entries allowed for processing an individual's pay check, including the need for allocating all pay types across projects.
7. Employee Self-Service:
    a. User-friendly interface
    b. Ability to see pay stubs and annual W-2 history
    c. Ability to select, and de-select, receipt of a paper pay stub. Prefer default to be "no paper pay stub" desired.
    d. Ability for employee to update: Address (to HR), W-4 withholding updates (to payroll)
    e. Access to pay simulators to calculate gross to net with access to employee pay and deduction data, especially for impact of contributing to Roth 403(b) and/or 403(b)

plans.

f. Ability to host on-line Open Enrollment annually.

8. Reporting:
   a. Is there be a default to have payroll taxes only associated with the State of CA as we only operate in CA but have both recruited or had employees relocate to other states during period of non-employment?
   b. Need a report each pay period to reflect the following:
      i. General Ledger for import
      ii. Employer Contribution Report
      iii. Audit Report (received vs paid)
      iv. Vacation/Sick balance report (Name, employee#, project #, Hire date, vacation balance, sick balance, PSL taken, PSL Balance)
      v. Stat report (Name, employee #, project #, title, hire date, pay rate, standard hours, health code, w/c code, pension eligible)
      vi. Exception reporting
      vii. Benefit tracking: Health insurance, supplemental insurance
      viii. Ability to generate desired reports that are not already available using a report writing tool or other capabilities
9. Deductions:
   a. Who is able to set-up a new deduction code? Staff or provider?
   b. Who is able to edit an existing deduction code?
   c. Ability to enter start and end dates for deductions codes as well as to set $ goals.
   d. Ability to turn on and off deductions without linkage to other codes, such as employer versus employee paid health insurance deductions.
10. Ability to handle multiple pay calendars within the agency beyond 26 pay periods: 21.7 pay periods, 20 pay periods
11. Ability to handle different pay week definitions: Sunday to Saturday and mid-Friday to mid-Friday.
12. Updates:
    e. How often is the system updated?
    f. How are tax change rules for either Federal or State of California handled?
    g. Describe the process used to release and update for changes in legislation, such as the past rollout of Paid Sick Leave (PSL) requirement for California?
    h. Is there any software checking for items such as any pay rates set below minimum wage? How, or will, the future California minimum wage increases impact the software?
13. Multiple pay rules are in place depending on the associated program. What flexibility is available for managing these?
14. What assistance is provided around FMLA tracking?

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Human Resources

Recruiting/Applicant Tracking

1. Can Electronic signature/submission of job requisitions be routed for approval?
2. Is system capable of handling multiple job requisition configurations simultaneously?
3. Is there a job description library that stores all active job descriptions and allows managers access to their own program's job descriptions?
4. Are job descriptions and details automatically populated based on the position being filled?
5. Will hiring managers have visibility of their own open job requisitions?
6. Can job requisition details be modified after creation?
7. Does the software allow for an unlimited number of statuses for candidates (i.e. new, in process, offered, declined, hired, etc.)?
8. Can users easily change candidate's status, either one by one or en-masse?
9. Does the software distinguish between internal and external candidates?
10. Can jobs be posted to our internal and external career portals?
11. Does the software integrate and communicate automatically with job boards?
12. Can job posting details differ by job board?
13. Can applicants reset forgotten passwords on the online portal?
14. Does the software allow administrators to define qualifying (knockout) questions to automatically reject ineligible candidates (i.e. are you legally permitted to work in the United States)?
15. Does the software allow creation of "universal" application questions, along with "job specific" questions?
16. Can applicants find jobs using keyboard or location based searching?
17. Does the software provide multiple options for completing the application process? (Please list)
18. Can resumes be uploaded to the system software and populate applicant data?
19. Are applicants immediately visible within the application after submitting job application?
20. Can the system software prevent applicants from applying for the same job twice?
21. Can applicants apply for multiple jobs that they are interested in at one time?
22. Does the software allow administrators to move candidates across job requisitions?
23. Does the software provide intelligent search and filtering capabilities to find candidates? When the applicant pool is being reviewed by multiple users, is there a way to make an indication about the potential desire to forward an applicant to an interview pool which is visible to the other reviewers without a notification being made to the applicant.
24. Does system offer way to establish an "Eligible to hire" list for a position and allow for applicant on this list to be hired after requisition has been inactivated?

Hiring

1. Is there an electronic approval process and workflow to hire applicants? If so, can this workflow be customized based on individual program needs?
2. Are we able to enter new hire with a future dated start date, with the ability to access the system from the hire date?
3. Is employee data pulled from the application to eliminate duplicate data entry?
4. Does the system automatically generate employee numbers for new hires based on client defined numbering rules?

Onboarding

1. Can a new hire access the system and start the onboarding process prior to their first day?
2. Does the system prevent multiple record creation for a rehires? If so, how?
3. Does the system support a paperless onboarding process with W-4, I-9 documents, electronic signatures, and the generation of the ongoing unique employee ID number?
4. Can new hires correct previously submitted information?
5. Does the system generate an offer letter?
6. Can the onboarding process and workflow vary according to multiple factors such as position and program?

Employee Self-Service

1. Can employees list multiple address types? If so, can employees have only one primary residence at a time?
2. What information can employees update on their own?
3. Can employees provide electronic signatures for agency specific HR policies? (i.e. dress code)
4. Can we configure which HR forms employees have access to by the following: Role? Program?
5. Can employees independently retrieve forgotten passwords?

Employee Records and Maintenance

1. What are the different categories employees can be sorted by?
2. What are the different categories we can search by to find employees?
3. Can we upload employee photos visible by HR only?
4. What kind of tables are housed in the system? (E.g. Job Table)
5. How are tables created and modified in the database? Do these tables establish parameters that ensure consistency (i.e. Job Code = Worker's Comp, EEO, Pay Grade)?
6. During entry, is information populated based on the tables housed in the system?
7. Does the system allow for multiple compensation structures (e.g. Mid – Max, Step Structure) specific to individual programs?
8. Does the system have a capability to send out alerts of upcoming actions to Managers? Can these alerts be sent to multiple levels?'

9. What alerts are currently offered?
10. How many alerts may we use?
11. Can we create custom alerts? Is there a cost associated with this?
12. Ability to maintain multiple rates per employee per job and/or work assignment?
13. Can the system maintain employee training/certification data?
14. Does the system provide a tool for creating mass updates to multiple employee records using effective dating?
15. Does the system support future dated and retroactive changes to employee records using effective dating?
16. Does the system support an unlimited number of client defined fields for employee record keeping?
17. Does the system track all changes to employee records? What, who, and when the change was made.
18. Is employee audit information visible in-application and through a standard report?
19. Does the system warn of changing existing records?
20. Can the system view be modified? (e.g. zoom in or out)
21. Does the system allow us to identify unique number of annual pay periods? (e.g. standard 26 pay periods, some programs are only 21.6 pay periods)
22. Can benefit or salary information be calculated based on pay period frequency? (18, 21.6, 24 or 26 pay periods)
23. Can designated pay periods be assigned to specific benefit plans?
24. Can the system send out mass email to staff based on configurable rules?

Manager Self-Service

1. Can managers have access to all their down-level reports?
2. What types of changes can be made through Manager Self-Service (MSS)?
3. Can change types have customized approval process and route based on program?
4. Can managers review evaluation history in the system?
5. Describe method for electronic approvals/routing?

Termination

1. Does the system allow for configurable termination workflows based on program needs?
2. Can users view terminated employee HR records?
3. Can user accounts be automatically disabled after a defined timeframe upon termination?

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Organizational Administration

1. How are employee-manager relationships defined and maintained?
2. Can the system provide for client defined organizational levels? Does the system have the ability to show and record indirect reporting relationships?
3. Does the system support an unlimited number of agency: Program? Department/Cost Centers? Jobs?
4. Does the system support management structures derived by organization hierarchy and direct employee to manager reporting relationships in the same instance?
5. Does the system use effective dating for all changes made to the organization's hierarchy?

System Administration

1. What is the process of providing a new user with log-in information?
2. What audits or reports are available for system administrators to review access and activity?
3. What parameters can be used when establishing user access throughout the application?
4. Can an unlimited number of access levels be established?
5. Does the system use role-based security to determine user privileges throughout the application?
6. If this is one singular system, who would have control over establishing access levels in different areas such as Recruitment, HR, Payroll, & Timekeeping?
7. Does system provide a tool that allows users to reset passwords? Administrators?
8. Does the system provide configurable rules for specifying global password policy? (e.g. strong password, password expiration, lockout after configurable number of maximum login attempts)

Document Management

1. Does the system have the ability to store and manage documents for and about employees in a single system?
2. Does the system contain to a central repository of documents with flexible search options?
3. Can employees upload and access their own documents at any time?
4. Are employee documents attached to the same record used to capture all employee information, providing a single source of data?
5. Are documents stored in a safe, virus-free environment?
6. Is access to documents established by user roles?
7. Can the system identify documents which contain Personally Identifiable Information and apply enhanced security and access controls to this sensitive information?
8. What are document size limitations?

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WORKFLOW

1. Application offers built-in and configurable workflows?
2. Workflows can be customized by program need?
3. Is there an unlimited amount of workflows?
4. Application provides a user friendly tool for configuring workflows without the need for vendor support or services?
5. Forms submitted through workflow are instantly and automatically routed to the appropriate supervisor?
6. Workflow can accommodate unlimited levels of approval?
7. Workflow can support conditional workflow (e.g. salary increase less than 3% does not require additional approval, but salary increase over 3% requires additional approval level)? Exceptions routed automatically for further review?
8. Workflow has ability to send different notification to various users at any stage during the workflow (e.g. notify IT new hire requires tablet on approval)
9. Workflows for the same type of data can differ by role (e.g. new hire submitted by manager requires approval, but new hire submitted by HR does not require approval)
10. Data is updated immediately across all functional areas upon approval (i.e. does not require interface to run to update payroll).
11. Administrators can view complete history of completed and in process workflows?
12. Workflow allows for e-signatures?

LEAVE ADMINISTRATION

1. Is real-time leave usage information from timekeeping shared with HR system to determine remaining LOA balance?
2. Can HR system calculate how much leave has been used/remaining?
3. Can system generate standard LOA forms to provide to staff?
4. Can approved LOA time be recorded in the HR system that Managers can view in Manager Self Service (e.g. Staff member is approved for up to 2 hours off per month for reasons related to leave)
5. Does the system send alerts to managers when LOA has been approved by HR?
6. Does the software support complex rules for accruing leave balances? Please describe.
13. Does the software provide configurable rules for how to carry over leave balances?

BENEFIT ADMINISTRATION

1. Does the software provide a single application for benefits, Payroll and HR with no interfaces?
2. Do benefit plans have effective dates?
3. Do benefit plan rates have effective dates?

4. Does the software allow for configuration of eligibility rules based on employee data?
5. Can rules be reused for multiple plans?
6. Can newly eligible employees (e.g. promoted to benefit eligible) view on-line enrollment wizard on Employee Self Service during enrollment period?
7. Does the software provide configuration options for determining when to end coverage if employee is no longer eligible?
8. Can benefit plans have configurable number of annual deductions based on program need (e.g. program only works 10 months so only 18 deductions instead of 24)?
9. Does the software support an unlimited number of carrier feeds?

OPEN ENROLLMENT

1. Does the software provide an intuitive, online self-service tool for employees to perform enrollments that can be accessed from home?
2. Can employees view current benefits and related information during enrollment?
3. Can employees choose to keep existing elections with no changes if eligible?
4. Can employees select to waive or decline benefits?
5. Can clients specify a list of profile forms to be updating during enrollment (e.g. address, marital status, dependents)?
6. Can employees only see options that they are eligible for?
7. Is employee eligibility dynamically updated based on information entered on profile forms during enrollment (i.e. if employee changes marital status from married to single during enrollment, employee does not see any benefit options that require the employee to be married)?
8. Can clients configure unlimited number of comparison points between options for employee to view during enrollment?
9. Can enrollments be made subject to a configurable approval workflow?
10. Can employees view total per pay period (based on program number of pay periods) and annual cost of elections as they make their selections?
11. Can clients use rich text editing options to configure text to appear throughout the enrollment wizard?

ACA ADMINISTRATION

1. Does the software automatically determine benefit eligibility based on average service hours worked over defined measurement of periods? If yes, please describe how this is accomplished.
2. Does the software automatically distinguish between service and non-service hours for average hour calculations?

3. Does the software provide administrators with a dashboard view that tracks which employees have maintained, gained, or lost eligibility over the course of a measurement period?
4. Does the software provide benefits administrators with visibility into the average hours per employee over the course of a measurement period?
5. Does the software allow administrators to override employees that lost coverage due to not meeting hours' threshold into benefits eligible state (i.e. if an employee's weekly average hours were 29.9)?
6. Are overrides tracked and can be reported on?
7. Does the software have the ability to automatically push enrollments out to eligible employees?
8. Will the software produce all required government reporting under the ACA?

PERFORMANCE DEVELOPMENT

1. Does the software provide a central dashboard view of all performance-related activities?
2. Can employees and managers create, monitor, and update progress for goals that are specific, measurable, achievable, realistic, and timely in an intuitive user interface?
3. Does the software provide the ability to cascade organizational and team goals down to employee level, and align employee contributions to the success of these goals?
4. Does the software contain configurable review forms, rating scales, and approval paths to mirror client-specific HR processes?
5. Does the software facilitate continuous, year-round feedback to aid in development?
6. Does the software provide the ability to identify and develop core strengths and proficiencies to drive business outcomes?
7. Does the software come with a standard library of core competencies?

COMPENSATION MANAGEMENT

8. Does the software support creation and maintenance of multiple salary structures, grades, and ranges?
9. Does the software allow flexibility to assign defined increase structures based on specific programs?
10. Does the software support the creation and maintenance of budgets?
11. Does the software support Total Reward Statements?
12. Does the software allow for scenario modeling for administrators? For managers? For employees?
13. Does the software provide configurable workflows and auditing for any changes?

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GENERAL STANDARD REPORTING

1. Does the software provide a library of standard reports across functional areas?
2. Do standard reports include parameters that allow users to control the report output?
3. Can users continue to use the application while reports generate?
4. Is application performance impacted by the report generation?
5. Can reports be downloaded to users' PCs in XLS or PDF format?
6. Can reports be generated On Demand?
7. Can reports be set up to run and sent to designated staff at regular intervals?
8. Does reporting and analytics data visibility respects the configured security model?

AD-HOC AND CUSTOM REPORTING

1. Does the software provide a built in ad-hoc report writing tool?
2. Can ad-hoc reports be created by any user – regardless of technical background?
3. Can ad-hoc reports be saved for reuse and edited if needed?
4. Can ad-hoc reports be set on a pre-defined schedule?

DASHBOARDS AND ANALYTICS?

1. Does the software provide in-application configurable dashboards for viewing summary analytics?
2. Can users access multiple configurable analytic dashboards?
3. Is access to analytic dashboards controlled by role based security?

NON FUNCTIONAL QUESTIONS
IMPLEMENTATION

1. Describe implementation methodology.
2. Describe the typical implementation project team.
3. What are the typical client roles and responsibilities?
4. How long is a typical implementation?

EDUCATION

1. What are your available training offerings?
2. Do you have suggested learning tracks for employees, managers, and administrators?
3. How is training delivered? On-Site? Webinar?

SUPPORT

1. Describe your support model?
2. What are your support hours of operation?
3. How do clients submit incidents?

4. How are support issues escalated?
5. Is there a guaranteed timeframe for when a response will be received on support issues?
6. Is there a single point of contact for clients? (i.e.: Would HR and Payroll call the same support specialist for system issues?
7. Do you offer in-application online help? Please describe?

TECHNOLOGY

1. Does the system offer one sign-in point for all users?
2. Can you provide single sign-on using Windows Authentication?
3. Please describe how your application is able to interface with our existing third-party applications? (Duplicate)

Specifications: Responses to this RFP should cover the following components; the number shown in parentheses is the weighting that component will receive in the rating matrix:

1. Firm Background
   - Firm Name
   - Home Office Address
   - Website
   - Contact Information for this RFP:
     1. Name and Title
     2. Phone
     3. Fax
     4. Email

2. Firm Structure and Experience (5 points)
   - Describe the ownership and structure of your firm.
   - Number of branches and size (overall as well as locally within Fresno County).
   - Number of employees.
   - Number of years in existence.
   - List your firm's lines of business (including affiliated companies).
   - General services you offer for HRIS systems.
   - Describe your firm's expertise in each of the following areas:
     1. Payroll Processing
     2. Benefits Administration including outsourcing capabilities
     3. Payroll Tax processing, including outsourcing as applicable.
     4. Time keeping services

5. Benefits Communication
6. Legal Compliance
7. Benchmarking
8. Research and Technical Services

- Provide a creative solution you've provided to a client in the past year.
- Number of new and resigning clients in 2016.
- Provide your privacy policy with regards to sharing client and account information with outside parties.
- Provide a conflict of interest statement that your firm; associate firms and/or key staff may have regarding these services. The statement should not only include actual conflicts, but also any working relationships that may be perceived by disinterested parties as a conflict. If no potential conflicts of interest are identified, state so.
- Provide proof of insurances carried for errors and omissions and fiduciary liability.

3. Non Profit Expertise / Relevant Experience / Client References (10 points)
   - Descriptions/examples of previous experience that may be relevant to servicing HRIS similar in size/structure to that of Fresno EOC's plans.
   - Provide a list of current clients with a similar non-profit structure.
   - Explain experience in providing services to businesses with non-profit structure.
   - List three clients, preferably non-profit organizations, whom we may contact as references. Please also include the number of years you have been working (or worked) with them.
   - Provide two specific examples of ways in which your company has made a positive change on HRIS you supported over the past 24 months (for example: increasing communication between HR, Finance, and Payroll).

4. Proposed Service Approach (30 points)
   - Describe your understanding of Fresno EOC's desired services.
   - Discuss your firm's philosophy on the process of providing HRIS services, including proposed techniques and methodology used.
   - State any difficulties foreseen in performing the designated tasks.
   - Describe your firm's technological capabilities and what resources are available including online access for employees.
   - List benchmarking resources utilized to stay current with, and to forecast, industry trends.
   - Describe your strategy for educating employees on HR initiatives.
   - Describe your strategy for educating employees on system changes.
   - Provide the availability and support response times of your representatives, to respond to employee questions and the method of communication utilized for this contact.

- Describe any services or portion of services, which will be performed by another vendor, and provide relevant information on said vendor's qualifications and personnel.

5. Service Team (15 points)
   - Describe the proposed account team such as:
     1. Name
     2. Job title
     3. Location
     4. Education
     5. Current responsibilities and area of expertise
     6. Years of experience with insurance plans
     7. Number of years with your firm
     8. Professional affiliations
     9. Professional qualifications (such as: honors, designations, other credentials)
   - Provide the number and average size of plans currently supported for each of the primary service team members who will be assigned to Fresno EOC.
   - Include resumes of these key individuals as an Appendix to this proposal.
   - Include your approach to providing quality customer service and education as well as response times on services such as responding to employee questions.
   - Supply an outline of key milestones to implement services and who will be responsible for completion of each milestone.
   - Provide a list and description of any current or pending administrative or similar actions against your or your firm or an affirmative statement that there are none.
   - Specify if you have on-staff ERISA counsel.

6. Small, Women, Disabled Veteran, or Small Business (10 points)
   - Efforts will be made to utilize small businesses, women, disabled veteran, and minority-owned businesses, with the consideration that the primary responsibility is the most favorable return to Fresno EOC. If applicable, provide publically certified documentation or a self-certification statement that is subject to examination. If not applicable, please so state.
   - Please provide details of any efforts towards diversity by your firm.

7. Proposed Fee Structure / Pricing (30 points)
   - All proposals must state the maximum total compensation for performing employee benefit insurance brokerage services for the term of the agreement.
   - Describe any and all fees for services to our plan under this proposal and payment terms which are available in terms of frequency (monthly, quarterly, etc.) and if payment is in advance or in arrears for that period.

- Are you willing to guarantee your fees for a specific period of time?
- If your firm provides a written agreement or letter of engagement detailing services provided to our plan, please provide a sample.
- Describe any performance guarantees you would be willing to include and the metrics that would be used to evaluate your performance.

Pricing will be reviewed based on reasonableness for services being provided, competitive market rates, and fee structure. Fresno EOC is not obligated to select the firm with the lowest fee proposal to perform these professional services.

Patent Indemnity

The Bidder shall hold Fresno EOC, its officers, agents, and employees, harmless from liabilities of any nature or kind on account of use of any copyrighted or un-copyrighted composition, secret process, patented or unpatented invention, article of appliance furnished or used under this RFP.

Propriety Proposal Material

Fresno EOC respects your professional privacy, any proprietary information revealed in the proposal should, therefore, be clearly identified as such.

Equal Opportunity Compliance

Fresno EOC requires all vendors to comply with Federal, State, and Local policies and regulations concerning equal opportunity and agrees not to discriminate in its employment because of the employee's or applicant's race, religion, national origin, ancestry, sex, sexual preference, age, physical handicap or any other trait or characteristic protected by law.

Selection Process

All eligible proposals will be reviewed and rated for their qualifications, experience, price, and suitability to complete the Scope of Work for this RFP. Fresno EOC, at its discretion, may request presentations from a short list of firms and/or request additional clarification information from any or all Bidders. However, Fresno EOC reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, which the Bidder can propose. All bids are subject to approval by the Fresno EOC Board of Commissioners. Notice to selected bidder to proceed with scope of work is anticipated by October 30, 2018.

REQUEST FOR PROPOSAL
For
Human Resources Management Information System
Bid Number: 030118

March 15, 2018

Proposal evaluation shall be based solely on the information provided in the proposal submittal package. Be sure to include all relevant information and evidence of your firm's record of performance and ability to perform the work.

Right to Reject

Fresno EOC reserves the right to reject any and all proposals received in response to this RFP. A contract for the accepted proposal will be based upon the factors described in this RFP. Fresno EOC reserves the right to waive informalities or irregularities in bids. In case of deviation from enclosed specifications, the bidders shall indicate in writing the exception(s) from the specifications. If no exception(s) is noted, it is understood that the specification will be complied within detail as requested WITHOUT EXCEPTION.

Fresno **Economic Opportunities Commission**

REQUEST FOR PROPOSAL
For
Human Resources Management Information System
Bid Number: 030118

March 15, 2018

Firm Name _____

	Maximum Points	Score
Firm Structure and Experience	*5*	
Non-Profit Expertise / Relevant Experience / Client References	*10*	
Proposed Service Approach	*25*	
Service Team	*10*	
Small, Women, Disabled Veteran, and/or Minority Owned Business	*20*	
Proposed Fee Structure Pricing	*30*	
Total Score	*100*	

Reviewer's Signature _____

Reviewer's Name _____

Date _____

Fresno **Economic Opportunities Commission**

REQUEST FOR PROPOSAL
For
Human Resources Management Information System
Bid Number: 030118

March 15, 2018

AUTHORIZATION:
The undersigned hereby asserts that he/she is duly authorized to submit this proposal, that all information contained in it is true, correct and complete, and that the undersigned is authorized to enter into a contract with Fresno Economic Opportunities Commission should he/she be selected and approved for services, as negotiated.

_____
Name of Firm

_____ _____
Name of Principal/CEO/Owner Print Signature

_____ _____
Title Phone

_____ _____
Address City/State/Zip

_____ _____
Date License # (if applicable)