



# Fresno Economic Opportunities Commission

## REQUEST FOR PROPOSAL

For

Human Resources Management Information System

Bid Number: 091418

September 17, 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](http://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. Friday, September 14, 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](mailto:greg.streets@fresnoeoc.org) with a subject line: HRIS RFP 091418

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](mailto: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](http://www.fresnoeoc.org)) under the RFP section. Fresno EOC will not accept questions after Friday, September 7, 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



# Fresno **Economic Opportunities Commission**

REQUEST FOR PROPOSAL  
For  
Human Resources Management Information System  
Bid Number: 091418

September 17, 2018

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



## REQUEST FOR PROPOSAL

For

Human Resources Management Information System

Bid Number: 091418

September 17, 2018

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 are listed below.

### 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 companies should concisely but completely describe the scope of services they feel are appropriate to Fresno EOC and its affiliate entities.

### 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



## REQUEST FOR PROPOSAL

For

Human Resources Management Information System

Bid Number: 091418

September 17, 2018

- 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.
  - n. Fresno EOC uses NOVATime Timekeeper Software. Please describe if your system is compatible with NOVATime software, a description of the process and cost to interface NovaTime to the proposed payroll system. If an alternate time keeping system is also proposed, please provide pertinent information about that system.
  - o. Assist in the development with interfacing to payroll system
  - p. 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.
  - f. 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.
  - g. Provide customer support services to our payroll office as required.



REQUEST FOR PROPOSAL

For

Human Resources Management Information System

Bid Number: 091418

September 17, 2018

3. General Ledger Upload
  - a. The bidder is to provide for a method to upload the detailed payroll journal entry into our general ledger. Fresno EOC uses Blackbaud's "Financial Edge" for its accounting software system. 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.
6. Beta Testing
  - a. The successful bidder will provide Fresno EOC with the ability to thoroughly test the software while it runs concurrently with the current system.



REQUEST FOR PROPOSAL

For

Human Resources Management Information System

Bid Number: 091418

September 17, 2018

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)



REQUEST FOR PROPOSAL

For

Human Resources Management Information System

Bid Number: 091418

September 17, 2018

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:
- a. How often is the system updated?
  - b. How are tax change rules for either Federal or State of California handled?
  - c. 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?
  - d. 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



## REQUEST FOR PROPOSAL

For

Human Resources Management Information System

Bid Number: 091418

September 17, 2018

In your response, please provide details regarding your ability to meet the following expectations and indicate whether or not the component is fully functional or in development. If in development, please provide expected timeline for completion. Indicate whether component is built in-house or provided by a third-party.

### **Recruitment – Essential**

Applicant Tracking Software to make the application, selection, and overall hiring process transparent and simple to manage for all users

### **End User System Access – Essential**

Should have user-friendly Employee Self-Service, with rule-driven annual Open Enrollment tool, and Manager Self-Service modules that provide transparent access to users for pertinent Human Resource information.

### **Employee Records and Maintenance – Essential**

The ideal system should offer great flexibility and administrator customization tools to meet the needs of managing 30+ individual programs' employee records. The system should feature strong data tables that will eliminate the need of maintaining spreadsheets outside of the system to record data that should be housed in the system. These data tables should connect to system information to auto-populate data once an identifier has been entered (e.g. selecting a new job code for an employee, will automatically add standardized information such as EEO1, job category, salary table, pay grade etc. with effective dating).

### **System Administration – Essential**

System should allow administrators to create and define user security access levels to database information based on established rules and parameters. System will maintain record of changes that occur and will be reportable as needed.

### **HR Reporting – Essential**

System should offer a robust, easy to use, reporting tool that allows data to be extracted from the system at a granular level with both “current” and “point-in-time reporting” that can be run in background without effecting system performance.

### **Leave Administration – Essential**

System should provide access to real-time leave status and information with ability to handle multiple mandated leaves.





REQUEST FOR PROPOSAL

For

Human Resources Management Information System

Bid Number: 091418

September 17, 2018

**Benefits – Essential**

System should provide intuitive, flexible, benefits administration which allows for multiple eligibility configurations, plan types, and enrollment levels.

**Workflow – Essential**

System will allow configurable workflows that may vary based on the action being processed. Ideally, would offer a capability to customize actions based on program need (e.g. Compensation increase in Program A can have a different route than a compensation increase in Program B).

**Affordable Care Act Administration – Optional**

System should produce all required government reporting.

**Performance Management – Optional**

System should allow employees and managers the ability to create, monitor, and update all performance related activities on a regular basis.

**Compensation Management – Optional**

A tool that should offer a way to track and maintain various compensation increase structures found throughout the agency while providing budgeting tools to Program Directors for planning purposes.

**Document Management – Optional**

System will offer a way to store agency documents in a secure location with flexible search options. Documents may be routed through assigned workflows with e-signature capabilities.



REQUEST FOR PROPOSAL  
For  
Human Resources Management Information System  
Bid Number: 091418

September 17, 2018

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



## REQUEST FOR PROPOSAL

For

Human Resources Management Information System

Bid Number: 091418

September 17, 2018

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 2017.
  - 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.



## REQUEST FOR PROPOSAL

For

Human Resources Management Information System

Bid Number: 091418

September 17, 2018

- 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.



## REQUEST FOR PROPOSAL

For

Human Resources Management Information System

Bid Number: 091418

September 17, 2018

- 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: 091418

September 17, 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: 091418

September 17, 2018

Firm Name \_\_\_\_\_

Maximum Points	Score
----------------	-------

Firm Structure and Experience	5	
-------------------------------	---	--

Non-Profit Expertise / Relevant Experience / Client References	10	
--	----	--

Proposed Service Approach	30	
---------------------------	----	--

Service Team	15	
--------------	----	--

Small, Women, Disabled Veteran, and/or Minority Owned Business	10	
--	----	--

Proposed Fee Structure Pricing	30	
--------------------------------	----	--

<b>Total Score</b>	<b>100</b>	
--------------------	------------	--

Reviewer's Signature \_\_\_\_\_

Reviewer's Name \_\_\_\_\_

Date \_\_\_\_\_



# Fresno Economic Opportunities Commission

REQUEST FOR PROPOSAL  
For  
Human Resources Management Information System  
Bid Number: 091418

September 17, 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)