# Request for Proposals (RFP): SCF17-1013

## *Human Capital Management (HCM) and/or Talent Acquisition System (TAS) Selection and Installation*

**RFP Release Date: April 21, 2017**

*Please direct all questions and replies to:*
*BW Dougan*
*Lyndon Group -Project Manager*
*Phone: 513-508-0351*
*Bruce.Dougan@Lyndon-Group.com*

*Director of Human Resources*
*Karen McIntire*
*4501 Diplomacy Drive*
*Anchorage, AK 99508*
*Phone: 907-729-6589*
*Fax: 907-729-4978*
*KMMcIntire@SouthcentralFoundation.com*

# Revision History

| Date | Revision Number | Revision Details | Revised By |
|---|---|---|---|
| 4/14/2017 | 0 | | |
| | | | |
| | | | |

# Table of Contents

# Section 1, Background and History

## 1.1 SCF History

Southcentral Foundation (SCF) is an Alaska Native-owned, nonprofit health care organization serving nearly 65,000 Alaska Native and American Indian people living in Anchorage, Matanuska-Susitna Valley and 60 rural villages in the Anchorage Service Unit. Incorporated in 1982 under the tribal authority of Cook Inlet Region, Inc. (CIRI), SCF is the largest of the CIRI nonprofits, employing more than 2,000 people in more than 80 programs.

## 1.2 Vision and Mission Statement

SCF's vision is a Native Community that enjoys physical, mental, emotional and spiritual wellness; its mission is to work together with the Native Community to achieve wellness through health and related services. The organization has developed and implemented comprehensive health-related services to meet the changing needs of the Native Community enhance culture and empower individuals and families to take charge of their lives.

# Section 2, General Information

## 2.1 Purpose of the Request for Proposal (RFP)

SCF is soliciting detailed proposals from software companies interested in providing installation, transition, start-up and associated training for both a Human Capital Management System (HCM) and/or Talent Acquisition System (TAS) to encompass all SCF. The selection committee could choose either an all-inclusive HCM or a combination of an HCM and a TAS. The bidder's proposal should clearly outline the areas covered.

The required Scope of Work is attached as Exhibit A.

## 2.2 SCF Contact Person

Any information required or questions regarding this RFP should be addressed and/or delivered to:


***Please direct all questions and replies to:***

*BW Dougan*
*1101 N Indian Hill Blvd.*
*Claremont, CA 91711*

*Lyndon Group - Program Manager*
*Phone: 513-508-0351*
*Bruce.Dougan@Lyndon-Group.com*

*Karen McIntire – Director of Human Resources*
*4501 Diplomacy Drive*
*Anchorage, AK  99508*
*Phone: 907-729-6589*
*Fax: 907-729-4978*
*KMMcIntire@SouthcentralFoundation.com*

# Section 3, Request for Proposal Details

## 3.1 RFP Schedule

This RFP will follow the schedule in the Table 2, RFP Schedule below; SCF reserves the right to modify this schedule.

| | |
|---|---|
| Issue RFP | 4/21/2017 |
| Deadline to Submit Additional Questions | 4/28/2017 |
| Issue Responses to Additional Questions | 5/9/2017 |
| Proposal Due Date | 5/24/2017 |
| Contract Award | 6/13/2017 |
| Service Start Date | 6/26/2017 |
| Installation Complete | TBD |

***Table 2, RFP Schedule***

## 3.2 Deadline for Receipt of Proposals

Proposals must be delivered in sealed envelopes or boxes and received no later than the bid opening times. Envelopes or boxes must be clearly marked as indicated below. Contractors are fully responsible for timely delivery of proposals. Any proposal received after the stated closing time will be returned unopened. If proposals are sent by mail, the Contractor is responsible for assuring actual delivery of the proposal to the address referenced in the General Information, Section 2.3 before the advertised date and hour.

Proposals are to be delivered to the address referenced in the General Information, Section 2. 3.

## 3.3 Other Licenses and Registrations Requirements

All Bidders must have a valid business license prior to award of contract.

All Bidders are required to hold all necessary applicable professional licenses and registrations required by Federal, State, Municipality or Borough law and proof of such will be submitted with each proposal. Obtaining and ensuring compliance to all licensing and registering requirements is the responsibility of the Bidder.

## 3.4 Conflict of Interest and Restrictions

If Bidder, Bidder’s employee, subcontractor, or any individual providing services under contract to SCF has a possible conflict of interest affecting the objectivity, analysis, and/or performance under contract, the Bidder is required to submit details in writing to SCF within (10) ten days of issuance of this RFP: SCF will determine if the conflict is significant and material and if so, may notify the Bidder in writing of elimination from the RFP process.

## 3.5 Addendum to the RFP and Right to Award

SCF reserves the right to issue written addendums to revise or clarify the RFP, respond to questions, and/or extend or shorten the due date of the proposals.

SCF reserves the right to not award or cancel the award of the contract to a Bidder who will not agree to all of the provisions and terms and conditions as contained within this RFP.

### 3.6 Cancellation of the RFP

SCF retains the right to cancel the RFP process if it is in SCF's best interest. SCF will not be responsible for costs incurred by Bidders for proposal preparation.

### 3.7 Contract Negotiations

This RFP does not obligate SCF or the selected Bidder until a contract is signed and approved by both parties. Upon completion of the evaluation process, contract negotiations may commence. If the selected Bidder fails to provide necessary information for negotiations in a timely manner and/or, negotiate in good faith, SCF may terminate the award of the contract. SCF will not be responsible for costs incurred by the Bidder resulting from contract negotiations.

SCF reserves the right to include additional terms and conditions during contract negotiations. However, these terms and conditions must be within the scope of the original RFP and will be limited to price, clarification, definition, administrative, and legal requirements.

### 3.8 Performance Bonds and Surety Deposits

SCF reserves the right to require a performance bond or surety deposit to assure the Bidder's performance of all contract terms and conditions.

# Section 4, Instructions for Bidders

## 4.1 Bidder's Review and Substantive Questions

Bidders should carefully review this RFP for errors, questionable or objectionable materials, and items requiring clarification. Bidders may submit these comments and/or questions in writing to SCF's contact person no later than 4/21/17. This will allow time for written response, clarification, or an addendum to the RFP to be issued, if required, to all bidders.

Contractors may not rely upon verbal responses made by any SCF employees or any representatives of SCF except for the purchasing agent listed below or their designee. Questions or clarification concerning this RFP must be directed to:

***Please direct all questions and replies to:***

*BW Dougan*
*1101 N Indian Hill Blvd.*
*Claremont, CA 91711*

*Lyndon Group - Project Manager*
*Phone: 513-508-0351*
*Bruce.Dougan@Lyndon-Group.com*

*Karen McIntire*
*4501 Diplomacy Drive*
*Anchorage, AK 99508*

*Phone: 907-729-6589*
*Fax: 907-729-4978*
*KMMcIntire@SouthcentralFoundation.com*

Contractors making contact with any other SCF employee regarding this RFP may be disqualified. Contractors have no claim against SCF for failure to obtain information made available by SCF and are solely responsible for conducting their own research, due diligence, or other work necessary for the preparation of proposals, negotiation of agreements, or delivery of services pursuant to any agreement.

## 4.2 Filing a Protest

A Bidder may protest the award of a contract or the proposed award of a contract. The protest must be filed in writing, addressed to the SCF purchasing agent, and include the following information:

- The name, address, and telephone number of the protester;
- signature of the protester or the protester's representative;
- identification of the RFP;
- detailed statement of the legal and factual grounds of the protest, including copies of relevant documents; and
- form of relief requested.

Protests will be treated in accordance with SCF policy. Only bidders that submitted a valid proposal may file a protest.

## 4.3 Proposal Content

A. SCF requests Bidders submit (1) one proposal consisting of Bidder's detailed plan for professional services.

B. The proposal must be addressed with a scope of work and compensation provided, as required by Section 5.1 (see details for requirements of Bid Section 6).
C. Bidders may not bid on more than (1) one request.

## 4.4 Other RFP or Proposal Requirements

A. A proposal's content will not be disclosed to other Bidders.
B. All proposals and other material submitted become the property of SCF.
C. SCF assumes no responsibility or liability for the transmission, delay, or delivery of proposals by either public or private carriers.
D. SCF discourages excessive or costly proposals. All costs incurred by Bidders in preparing and submitting a proposal are the Bidder's responsibility and shall not be charged to SCF or reflected as an expense of the resulting contract.
E. It is the responsibility of the Bidder to indicate within their proposal the applicability and compliance of any other federal, state, municipal, or other governmental statutes, regulations, ordinances, acts, and/or requirements.

## 4.5 Proposal Withdrawal and Correction

A proposal may be corrected or withdrawn by a written request received prior to the date and time of proposals being due.

# Section 5, Format for Proposals

## 5.1 Proposal Content and Format

The completed bid must be emailed to Ms. Melanie Morris – SCF Project Manager and BW Dougan – LG Project Manager prior to the Proposal Due Date. The proposals must also be compiled in a binder with tabs separating sections, printed on both sides of the paper when possible, and organized in accordance with this section and must arrive in Ms. Morris' office prior to the Proposal Due Date. For the hardcopy proposals, please provide (1) one original and (5) five copies of the proposal to SCF (Melanie Morris) and (2) Copies to BW Dougan. Their respective emails and addresses are listed above.

### Bid Section 1, Title Page

The title page should be on Bidder letterhead. It should contain the name and identification number of this RFP and identify the name, title, company, mailing address, phone numbers and email address of the person(s) authorized to commit the Bidder to contractual arrangement with SCF. This person(s) will be the Bidder's authorized contact for all communication. Bidder may also identify an alternate contact person in case the authorized contact is unavailable.

### Bid Section 2, Table of Contents

The proposal will have a table of contents with page numbers and pages numbered throughout the proposal.

### Bid Section 3, Introduction

Brief introductions include the following:

A. A statement indicating that all information in the proposal is accurate, truthful, and factual; certifying that personnel and resources proposed will be made available to fulfill duties and obligations of the contract, if awarded.
B. State the proposal and submitted prices shall be valid for at least (45) forty-five days from proposal submission deadline until any awarded contract is established and signed.

### Bid Section 4, Qualifications

Qualifications include the following:

A. The technical skills, qualifications and staffing to complete the Scope of Work on a timely basis
B. Special qualifications or training that are required to complete the work
C. Examples of Customer Service, Training, On-going support and Quality of work that shows the bidder is highly qualified to deliver the project requirements
D. Provide (3) three references to include work completed, contact information (name, email and phone number), and period of contract. References in the Healthcare industry and in Alaska will be preferred.
E. Provide a detailed list of all personnel who will be working on this project. Note their role, skills and if they will be conducting their work on SCF's site or remotely.

### Bid Section 5, License / Insurance Requirements

Insurance requirements include the following:

- Business license or any other licenses and/or registrations as required by this RFP,
- insurance certificate,
- proof of professional licenses, as applicable or required by law.

## Bid Section 6, Scope of Work

A. Bidders will include a separate scope of work and detailed bid for the full project/portion of project Bidder elects to bid on. See Exhibit A for complete Scope of Work description.

B. Bidder's scope of work should address the following requirements as applicable to the nature of the location.

***Personnel, Equipment, and Supplies***

Contractor is required to supply all personnel, equipment, computers, and all other implements necessary to execute and fulfill the duties of this contract.

Contractor is required to follow all corporate procedures for securing end-computing devices used as part of the scope of work.

## Section 6, Selection Process

### 6.1 RFP Compliance

Prior to evaluation, each proposal will be reviewed to determine whether or not it is compliant with RFP requirements. Noncompliant proposals will not be evaluated. Factors that may result in a proposal being declared noncompliant are:

a. Not providing evidence of meeting minimum requirements.
b. Substantial and material conflicts of interest that were not declared.
c. Substantial and material noncompliance to requirements of RFP section on format for proposals.
d. Insufficient information regarding scope of work or compensation.

### 6.2 Evaluation Process

An evaluation committee consisting of (3) three SCF employees will independently evaluate proposal compliance and content.

Bid evaluation will be based on (7) seven criteria and point values and will be documented by recording a final score calculated as the average score of the three committee members' individual point value totals.

### 6.3 Evaluation Criteria and Point Value

| Evaluation Criteria | Point Value | Details |
|---|---|---|
| Format and Presentation | 5 | Evaluation of proposal compliance and format. |
| Qualifications re Scope of Work | 20 | Evaluation of qualifications, references and ability to deliver the Scope of Work. |
| Timeline | 10 | Evaluation of Bidder's ability to meet SCF's preferred timeline. |
| Implementation, Transition, Start-up | 15 | Evaluation of Bidder's ability to meet SCF's requirements during the Implementation, transition and start-up phases. . |
| Training | 10 | Evaluation of Bidder's training programs and methods. |
| Customer Service | 15 | Evaluation of Bidder's Customer service during installation and ongoing. |
| Price Proposal | 25 | Evaluation of pricing provided for in Bidder's proposal, as provided in Exhibit C, Cost Proposal Schedule. |
| **Total Point Value - 100** | | |

***Table 3, Evaluation Criteria and Point Value***

### 6.4 Discussions

As determined by the evaluation process, Bidders may be offered the opportunity to discuss their proposal with appropriate SCF personnel or evaluation committee and the proposal may be adjusted as a result of that discussion. Bidders may also be allowed to submit a best and final proposal as a result of any discussion.

### 6.5 Presentations

SCF reserves the right to require a verbal presentation of their proposal. If presentation is requested, Bidders will be notified in writing of the request, date, time, location, and amount of time allowed for the presentation and/or questions and answer period. Time frames will be strictly enforced.

The entire evaluation committee will be present for oral presentations. All costs associated with a verbal presentation will be the Bidder's responsibility.

### 6.6 Notice of Award

A notice of contract award will be provided to all Bidders.

# Section 7, Standard Contract Terms

## 7.1 Introduction

SCF is providing the following provisions as a consideration for Bidders to review in advance of a submitted proposal. These and other standard provisions will be presented to a successful Bidder at the time of contract award.

## 7.2 Compensation

Payment to Contractor will not exceed the amount awarded in the contract.

A. Change orders and work orders may be approved by SCF at specified rates.
B. Additional services performed by the Contractor that are not specifically provided for in an Agreement will be not compensated; nor may the Contractor perform any services not covered by the Agreement unless the services are specifically approved in writing by the SCF Program Manager or another authorized SCF agent.
C. All invoices should include a brief description of the work completed (e.g. dates, number of hours, location services performed, applicable SCF program) and the applicable SCF account line item number. Invoices shall be submitted with the Account/Line Item Number, as provided by SCF.
D. Contractor must submit monthly invoices to SCF via email to scfappillar@scf.cc or mail Southcentral Foundation, ATTN: Accounts Payable, 7033 E. Tudor Rd., Anchorage, AK 99507.
E. Payment is due (30) thirty days after receipt of an invoice by SCF.

## 7.3 Termination

Either Party may terminate an Agreement, in whole or in part, for cause, at any time by written notice of the terminating Party to the other Party. Either Party may terminate an Agreement, in whole or in part, without cause, by a (30) thirty day written notice of the terminating Party to the other Party. Notice of termination will be sent by certified mail. If hand delivered, then the delivery of the notice of the termination will be evidenced by a signed and dated receipt. The obligation to pay monies due under an Agreement for services provided prior to the termination if any, will survive termination.

## 7.4 Status of Independent Contractor

The Parties intend that Contractor must provide the work described in an Agreement as an independent contractor. As an independent Contractor, Contractor is not an employee of SCF. Therefore, payments made to Contractor by SCF will not be eligible for unemployment compensation or other similar benefits. Contractor is responsible for paying all employment, income and any other taxes with respect to such payments. Neither Contractor nor any Party employed by the Contractor will be deemed for any purpose to be an employee, agent, servant or representative of SCF. Furthermore, Contractor shall not assert in any legal proceedings arising out of this Agreement that Contractor or any Party employed by Contractor is an employee or loaned servant of SCF.

## 7.5 Insurance Requirements

Contractor shall purchase and maintain in force at all times during the performance of services under an Agreement the following policies of insurance, unless expressly waived below by SCF in writing. Where specific limits are shown, it is understood they will be the minimum acceptable limits. If the Contractor's policy contains higher limits, SCF will be entitled coverage to the extent of such higher limits. Certificates of Insurance and the attachments of Additional Insured Endorsements and Transfer of the Waiver of Rights Endorsements must be furnished to the SCF Contract Administrator prior to beginning work. Failure to furnish satisfactory evidence of insurance or lapse of the policy is a material breach and grounds for termination of the Contractor's services.

1. *Commercial General Liability Insurance:* Contractor shall provide Commercial General Liability Insurance with coverage limits not less than \$1,000,000 Combined Single Limit for Bodily Injury and Property Damage per occurrence and \$2,000,000 Combined Single Limit of Bodily Injury and Property

Damage Aggregate. Coverage is to be on a standard ISO version commercial general liability policy form, or its equivalent, providing coverage for premises-operations liability, products-completed operations liability, personal and advertising injury liability, and contractual liability including independent contractors.

2. *Workers' Compensation Insurance:* The Contractor must maintain Workers Compensation and Employers Liability Insurance for his own employees in the amount required under Statutory Limits for those states in which employees are working and Employers Liability Insurance as required by state and federal statutes. The employer's Liability Insurance shall not be less than $1,000,000 per bodily Injury per accident, $1,000,000 bodily injury by disease per employee and $1,000,000 bodily injury by disease policy limit. The Contractor will also be responsible for insuring that any subcontractors who directly or indirectly provide services under this contract maintain Workers' Compensation Insurance in the amount required under Statutory Limits.
3. *Professional Liability Insurance:* The Contractor will carry Professional Liability coverage at a limit of $1,000,000 Per Claim and $2,000,000 Aggregate. The policy will be endorsed to include sexual abuse coverage with a minimum separate limit of $1,000,000 per claim. If the professional liability policy is written on a claims form, the Contractor will provide insurance for a period of (2) two years after final payment of this agreement.
4. *Commercial Auto Liability Insurance:* Contractor shall maintain a commercial automobile liability insurance policy covering all owned, hired, and non-owned vehicles to be used or in connection with the Contractor, with coverage limits not less than $1,000,000 per person/$1,000,000 per occurrence combined single limit bodily injury and property damage.
5. *Subcontracting Requirements:* The Contractor is required to have prior approval by SCF before using any subcontractor. SCF may, in its sole discretion, withhold its approval for any reason or for no reason. Additionally, Contractor will be responsible for ensuring that its subcontractors comply with the same insurance provision as required herein as required by Alaska law during the course of its subcontractors' operations. Contractor shall provide copies of all subcontractors' certificates of insurance and endorsements to SCF prior to any subcontractor commencing work.

### 7.6 Compliance with Legal Obligations and SCF Code of Conduct

Contractor agrees to comply with all federal, state and local laws; ethical, environmental or safety business standards; and any underlying agreement or grant provisions to which SCF is subject. Contractor shall ensure that the provision of services and/or expenditure of funds under this Agreement do not violate any laws, business standards, or underlying agreement or grants. Contractor shall be responsible for any damage or injury not caused by SCF as a result of Contractor's, or any subcontractor's or their employees', servants,' or agents' failure to comply with any law, applicable business standard or underlying agreement or grant. Furthermore, Contractor has been supplied with a copy of SCF's Code of Conduct and agrees to comply with its provisions and to complete SCF compliance training if necessary.

### 7.7 Monitoring

SCF may establish a schedule for periodic review of Contractor's performance. Review may be at least once a year, or as frequently as SCF determines necessary.

### 7.8 Nondiscrimination

Contractor shall not discriminate against any employee or applicant for employment because of race, color, religion, national origin, ancestry, age, sex, marital status, or "qualified individual with a disability status."

### 7.9 Governing Law, Venue and Jurisdiction

Any Agreement will be governed, construed and enforced in accordance with the laws of the State of Alaska and the United States of America. All parties expressly agree that should litigation or any legal proceeding be necessary under this Agreement, the same will be commenced exclusively in Alaska Superior Court, Third Judicial District at Anchorage or in the United States District Court for the District of Alaska.

## 7.10 Audit and Examination of Records

Contractor agrees to maintain and make available for review by SCF all books, records, documents and other evidence pertaining to costs and expenses of an Agreement for examination and audit by SCF for a period of (6) six years from and after the termination of this Contract. SCF shall have the right to make copies of documents audited and such copies will become the confidential property of SCF.

## 7.11 Media Contact

Contractor, its employees, agents, and subcontractors shall not contact any member of the print or electronic media as a representative of SCF without the prior written approval of the President/CEO of SCF. If any member of the print or electronic media contacts the Contractor asking for information, the Contractor will refuse to comment and will refer the inquiry to SCF's Office of Public Relations. Further, Contractor will not use SCF's name in any advertising, publications, promotional materials or publicity release concerning any Agreement or the services performed under it.

# EXHIBITS

## EXHIBIT A

- **Scope of Work**
- **Requested timeline for each section of work**
- **Requested pricing and processes**

## EXHIBIT B

- **List of current Reports utilized within the SCF Organization**
- **As part of your bid, provide a process and cost to replicate these reports. If some will be on Dashboards or replaced, please note this.**

## EXHIBIT C

- **Proposal Offer and Signature Page**

# EXHIBIT C: Proposal Offer and Signature Page

RFP Number: SCF17-1013

RFP Name: Human Capital Management (HCM) and/or Talent Acquisition System (TAS)Selection and Installation

RFP Due Date and Time: May 17, 2017 no later than 6:00 pm Anchorage time

Submission Process:

- The completed bid must be emailed to Ms. Melanie Morris – SCF Project Manager and BW Dougan – LG Project Manager prior to the Proposal Due Date.
- The proposals must also be compiled in a binder with tabs separating sections, printed on both sides of the paper when possible, and organized in accordance with this section and must arrive in Ms. Morris' office prior to the Proposal Due Date. For the hardcopy proposals, please provide (1) one original and (5) five copies of the proposal to SCF (Melanie Morris) and (2) Copies to BW Dougan.

***CONTRACTORS MUST COMPLETE THE SECTION BELOW***

By signing below the contractor agrees to all terms and conditions as listed within this Request for Proposal issued by SCF.

Is an Alaska Native / American Indian Business Owner Preference being claimed? **YES ☐ or NO ☐**

Company Name:________________________________________

Contact Name: ________________________________________

Email:______________________________________________

___________________________________________________

*Address* *City* *State* *Zip Code*

Phone:______________________________________________

Date:_______________________________________________

Authorized Signature: ____________________________________

# END OF RFP

# *Scope of Work for: Human Capital Management (HCM) and/or Talent Acquisition System (TAS) Selection and Installation*

## Opening

This Scope of Work (SOW) was developed to support and detail the Request for Proposals for the Human Capital Management (***HCM) and/or Talent Acquisition System (TAS) Software Selection and Installation.*** The selection committee could choose either an all-inclusive HCM or a combination of HCM and TAS. The bidder's proposal should clearly outline the areas covered.

This is not an all-inclusive list. Please include items that you would like Southcentral Foundation to consider while going through the RFP process and are pertinent to the proposal.

A few of the topline/key requirements include:

- HRIS full system (HCM and TAS)
- Time and attendance tracking system and associated "time clock hardware"
- Expandable, Scalable, Reliable, Flexible
- Stay up to date with hardware and software updates
- Integrate with existing systems across SCF Organization (work flow, approvals, bi-directional)
- Ease of uses for end user
- All systems/changes must be trackable and auditable for 7 years
- Single-Sign On (SSO) Support e.g. SAML 2.0 Compliant, Azure AD Authentication
- Secure and compliant across total system
- Optimized for Mobile: Mobile Support for Android and iOS devices
- Browser agnostic

As part of your proposal, please describe "How do you differentiate yourself from your competition?"

Provide a five-year future review of the HCM/TAS marketplace and how you will stay forefront in this area. How do you "Future Proof" your clients?

At the end of the SOW is a list of "Must Provide" including; training, references, documentation, etc.

## Body

### Talent Acquisition

Define your Talent Acquisition System's ability to Integrate with an HCM for Position Management.

#### Requisitions:

Describe the creation of requistions

- Provide a copy of your position templates
- Outline how you manage requisition changes after they have been approved and/or posted

Describe how the system can pull information from position descriptions to create a job posting.

Explain how your system uploads and maintains multiple documents (i.e. certifications, licenses, driving records, CIB's) for a requisition and then maintains this information for the applicant/candidate.

Outline the tracking of requisitions as they are processed through the system:

- Approvals – routing and notifications for multiple users
- Ability to push the requisition forward if approvers are not responsive; escalate to next level
- By budgets; division/department/location/manager
- How statuses are used (Open/Pended/Hold/Closed) and the ability for SCF to Add/Edit and/or Delete statuses
- Required fields and the ability for SCF to make fields required

Indicate how your system would allow active requisitions that are not posted to be included.

Define how requistions are made available to multiple Hiring Managers (i.e. pooled candidates).

- Include how notes and or comments are visible to multiple Hiring Managers on pooled candidates and centralized panels

Identify who has access to what information/ discrete data fields.

- Recruiter: what they are working on vs. all open positions
- Hiring Manager: their openings vs. all open positions

## Applicants/Candidates:

Explain how your system supports employee referrals and tracking.

Describe how your system dispositions candidates

- Include the ability to provide a dropdown list for reasons of hiring or not hiring
- Indicate how dis-qualified candidates are retained in the system. Timing. Automatic.

Depict how the system captures and defines candidates

- Active
- Passive
- Pooled
- Pipeline

Specify what happens when a candidate accepts a position and how this affects other positions (i.e. automatically remove them from being a candidate for another position)

- Update the New Hire List

Differentiate how your system assists in sourcing candidates

- Integrated with the system or linked with 3rd party (job boards)
- Manage costing with job boards
- Internal employees
- Previous employee

Describe the capability for applications and/or resumes to be uploadable and scanable.

Define the maintainance of resume/application changes.

Explain how a candidate may submit/maintain multiple applications in our system.

Explain how pre-screenings are processed

- Release forms and additional required data (i.e. birthdates)
- Background checks
- Skills assessments
- Licenses, credentials, competencies and certifications
- Personality profiles
- Hurdle questions

Once screenings are completed, indicate how they integrate with the candidates profile

- Background checks
- Skills assessments
- Licenses & credentials
- Personality profiles
- Hurdle questions

Identify if your system offers correspondence templates and provide examples.

Define how the collected information (application, resume, screenings) is collected under the applicants' profile and is made available in one location.

Identify how your system extrapolates years of experience from dates. (i.e. worked from 2005 to 2010 = 5 yrs).

Specify how your system offers Candidate self service.

Explain how SCF would force dropdown selection vs. freeform text.

## Pooled and/or Passive Candidates:

For pooled candidates, indicate if all Managers see one posting.

Indicate if hiring managers may colaborate/view each others' note and comments.

Share with us how your system tracks leads from conferences and events.

Outline how a candidate's history, including attachments, follows the candidate through the system

- Backgroud notes
- Interview notes
- Reference checks
- HR notes, etc.
- Associated with the candidate and not the posting

SCF highly utilizes centralized panels and pooled candidates.

- Explain how your system supports and processes centralized panels
- Explain how your system manages pooled and passive candidates

## Alerts and Notificaitons:

Denote your Alert and Notifications messages.

- Alert the role has been posted

- Messages to the hiring Manager when a candidate accepts or declines an offer of employment
- Automatic
- Depict who receives; Manager, Recruiter, Payroll, HR

## Reports and Dashboards:

Exhibit B contains a detailed list of current reports and forms. Describe how your system will integrate or replace these reports.

Describe the tracking and reports methodology for:

- Timelines
- Source of resumes
- Matrix of various data collected during recruiting process
- Standard/Custom
  - Ability to pull specific groups, pools, etc.

Explain how the recruiting manager can monitor the recruiting teams work.

- Number of open reqs, Time to fill, etc.

Describe how you create a master list (dispositions) for recruitment and a version for manager(s) for all applicants before an offer can be extended.

## Social Media/Job Boards:

Describe how the recruiting feature connects with social media.

Indicate your interface with and support of Social Media platforms

- LinkedIn, Twitter, Facebook, etc.

Define how postings may be indexed to other sites.

Explain your system offers job board management.

Identify the system's interface with job boards.

- Utilization
- Indicate which job boards can SCF partner with and any limitations

Explain how your system will use search to optimize working with job boards.

Descibe how applicants can apply through different Social Media venues.

## Other:

Explain how your system ulitizes the tag function.

Define your system template building process and ability to auto populate.

Outline which functions are available on various devices (Laptop, Tablets, Phone, etc.)?

- Explain which functions are not available.

Classify access through all browsers and explain any limitations.

Relate how your services provide

- Best practices suggestions
- Message boards/chat rooms with other users

Define how the system can download current recruiting efforts (requistions, resumes, applications, etc) from the current system.

Explain how to manage batch job posting options for large quantity positions (such as RAISE Interns) and not have to post 60 jobs off the web.

List what Training is available to Recruiters

- Best Practices
- Use of System

Batch Clean-up

- Duplicate applications
- Duplicate requisitions
- Batch Dispisitions

Indicate if your system offers CRM-MS Outlook interface.

Specify if your system offers a shared calendar.

Explain how your system handles email marketing campaigns and matrix.

Explain your system's offer of Keyword searches.

Explain your system's mail merge functionality.

Define your system's ability to offer multiple application types.

- Define any limits to the number of applications types

Distinguish your system's capability to provide Predictive Analytics and employee retention recommendations.

Define how the recruiting feature connects

- With on-boarding
- With payroll

## On-Boarding

Define the ability to produce:

- Offer letters
- New Hire paperwork (policies, handbook, tax forms, etc.)
- I-9 completion
- Can the system identify when documents or steps are missing

Support the claim that your system maintains a positive experience.

- Personalize messages
- Instructions and/or expectations

- Training videos
- Social media contact

Indicate pre-populated additional areas (such as):
- Personnel Action Requests
- Training
- Benefits

Delineate your system's offer of multiple on-boarding experiences.

## Scheduling

Identify what scheduling systems your system provides/supports.
- Ability to schedule SCF employees in specific job functions; on a real-time basis.
- Describe how your system specifically addresses the unique needs of healthcare and 24-hour scheduling
- Interface/Feeds with Payroll
- Interface/Feeds with Time and Attendance

## Time & Attendance

Address tracking time & attendance

- Badge swipe, system sign-in, web clock
  - Included or requires 3rd party
- Time worked
- Location
- Multiple pay rates & positions
- Multiple types of pay, hourly, salary, daily, on-call, differentials, etc.
- Capability to audit and display all edits to timesheets
- Notifications for missed time or punches
- Grant tracking
  - Certification statement (specific grant and policy requirements for timecard approver) on each pay period approval
- Absence notifications or alerts
- Holidays
- Leave entitlements or accruals, personal leave, FMLA, workers comp, etc.
- Ability to enter attestations or certifications of time
- Automated retro processing available
- Clock rounding and/or grace time available
- Ability to create and send automated approval reminders included in the system functionality
- Ability to set up multiple schedules with meal periods designated
- Employee's edit of own timesheet be suppressed
- Approvals being rolled up the approval chain or hierarchy automatically
- Multi-State compliance and functionality
- Notifications for missed time or punches

Time and attendance replacement

- Hardware and interface
    - Physical, wall-mounted time clocks are a requirement
    - Specifically, SCF will require 75 RFID touch screen units with installation and connection to the installed software. Ensure this is a separate line item on your response with significant details.
- Must be able to store locally and transmit later in the event of a temporary network or service interruption
- Security badges (picture ID) are a requirement
- Ability to log in from various locations, multiple methods (badge, mobile, computer)
- Ability for employees to check time and location logs

Indicate if there is an employee self-service feature and how it would respond to:

- Change or trade shifts or days off
    - With supervisor approval
    - Ability to provide push notification or alert to manager when scheduled employees are not clocked in within a certain threshold
- Request time off and get approvals; Automatically updating the timesheet upon approval
- Review paid or unpaid time off. Time off Reporting

Specify if there a feature which allows departments to schedule employees to work.

- Standard schedule
- Flexible schedule
- Modifications

Indicate if the system may be modified to add additional information

- Approvals per grants statements
- Multiple approvals
- Proxy approval ability

Denote if the system will integrate successfully with Serenic Navigator. Explain any issues.

- Bi-directional flow to Serenic Navigator (Payroll and General Ledger)

## Payroll/Finance

While a full implementation of a Payroll system is not part of this project, describe the interact action on the following:

- Bi-directional flow to Serenic Navigator (Payroll and General Ledger)
- All systems/changes must be trackable and auditable for 7 years
- Payroll complexity spanning: Government, states, grants

Single Sign On (SSO) Support; Concur, Benefits, Payroll history and check viewing and others

- Describe how an individual employee views their current check stub
- Define how far back can an employee search their history
- Specify the aspects of an individual's pay which will be viewable within your system
  Base Pay, Commissions, Bonus, Discretionary, etc.
- Individual tracking, printing, etc.

Distinguish how you manage all the electronic communications

- Banking, Taxes, Benefits, Leaves, etc.
- Multiple Direct Deposits, Garnishments

Describe how your system integrates with and manages Payroll

- Check Management
- Employee interaction: Viewing, History, Printing
- Tax interface: Federal, multiple states, local

## Compensation

Provide an overview of the key compensation features of your system

- How pay grades tie to positions
- Automated auditing of pay placement (above/below grade minimum and maximum)

Describe how your system enables a manager to

- Create and track compensation for budgeting reasons.
- Manage workflow for approvals across multiple departments, levels, professions, locations, grants, etc.
- Manage Merit, Performance, One Time, Bonus, Commissions, etc.

Provide examples of Total Compensation reports and how they are managed.

Provide details of the audit log capabilities and details of viewing and changing records that contain compensation or other personally identifiable information.

## Benefits

SCF has a complex benefits program as they must provide multiple governmental packages and other 3rd party vendors (Brokers, insurance, Financial services). For example, there will be multiple effective dates depending on type of benefit and multiple term dates depending on type of benefit. Please describe:

- Your integration/interface processes with each group. Specific SCF groups include; Tribal Insurance Processing System/TIPS, Guardian Anytime, Professional Benefits Services
- How you handle FSA/HSA spending accounts
- Ability to automate complex term dates where different variables are followed for when a benefit ends depending on benefit type
- How they communicate, automate, share info

Describe the Self-service capability requirements

- Health, LTC, Life, Financial (Retirement Plans), COBRA
- Optional coverage
- Wellness services
- Automated Open Enrollment Functionally and confirmation notifications
- ACA tracking and reporting and automated 1094-C and 1095-C forms
- How your system uses automate deduction updates
- How you track point in time changes within the benefits plan setup
- How to configure in your system eligibility requirements

Define what tools/templates/processes do you provide that will enable the management of a benefits program.

Indicate what support is given with setup of benefit plan configuration.

Describe how transfer of current elections is made from current system to new system.

Provide an overview of Retirement processes

- Self-Service and Manager processes
- How the system manages years of service for rehires and breaks in service (adjusted hire date)
- How years of service are managed in the system

SCF does not currently provide pensions or 401(k), but for potential future use, describe how your system manages retirement/pension/401(k) systems.

- Exports 401(k) enrollment/change data exchange with a broker/trustee/3rd party system
- Transfer of dollars upon termination/retirement
- Transfer of dollars into the SCF program from other systems
- Enables the self-service for an employee: Selection, tracking, changes, etc.
- Pension systems across multiple states
- How your system tracks pension payouts/minimum required distributions to terminated employees

## Talent Management/Succession Planning

Talent management is the intersection of multiple portions of an HCM/TAS systems. Describe your system approach to:

- Succession Planning
- Career Maps/Paths/Career development
- Individual Career Path process
- Metrics/Tracking/Reporting systems
- Top Performers, HiPo's
- Ability to track disciplinary actions

At this time, SCF utilizes a SCF developed Performance Management system; indicate how you would incorporate

- Bi-directional feeds with their Performance Management
- Integration/interface with third party performance Management systems
- Integration/interface with other systems

Outline how your system enables Performance Management/Goal Setting processes.

- Ability to do 360 Surveys
- Ability to do Annual Evaluation and Performance Development Plans
- Ability to integrate Merit Cycle End Scores
- Ability to send out alerts and notifications and reports
- Employee, Department, Function, Corporate goal setting and tracking
- Integration/interface with other systems

Describe your Succession Planning Systems

- Employee, Department, Function, Corporate goal setting and tracking
- High Performance (HiPo), Up or Out, Performance
- Specific skills, competencies, licenses, etc.
- Integration/interface with other systems
- Indicate if the system provides Predictive Analytics. Provide an example.

## Competency, Certification and License Tracking

Describe how your system enables the tracking and notifications/alerts for SCF's health care workers

- Competency, Certification and License Tracking
- Integration and interface with other systems

Identify if your system allows for 30 day, 60 day notifications based on expiration dates entered for license, certification and background data. Specify interface with Outlook. Please describe how this function works.

Explain how your system allows license and certification renewals to be entered as a new license entry to preserve historical data. Clarify if you are "a point in time system". Please describe how license and certification data is documented in your system.

Define how your system allows multiple license and certification entries for each employee. Identify any limits to the volume of license and certification types and entries.

Describe the reporting features your system allows for license, certification and background tracking.

## Data Services

In a hosted system, how do you manage

- Data storage and access
- Data query and retrievable
- Data Analysis support
- Security and Risk systems

Describe how outages (preventive and emergency) are communicated and managed.

Outline how you manage backups and retrievals.

## IT

Provide an overview of your system architecture

- Identify how you would ensure SCF's hardware and software compatibility
- Provide a list of suggested upgrades/enhancements prior to beginning the installation

Describe your software development lifecycle.

Distinguish how you ensure your system stays current.

- Describe how updates are managed
- List the browsers you work with: names and versions
  - Discuss version status and speed to adopt
  - Identify if your solutions require any browser plug-ins such as Java or Flash

Provide a set of measures you utilize to track and report your System's performance

- Response time, Up time, Recovery time after an outage, etc.
- Provide a copy of your standard SLA

Describe your issue resolution system

- During implementation and ongoing
- Ticketing, Chat, Phone, Text, email, on-site, etc.
- How are outages (preventive and emergency) communicated and managed

Describe your Risk, Compliance and Security approach and results

- Systems, Standards, Updates, etc.
- Manage role based access
- How access logs are maintained by user identification and what is contained in them
- Your communication protocol if a security issue is suspected
- How you complete ongoing audits/tests/reports on your risk/security systems
- Please provide a copy of your written security policy.

Outline implementation, transition and start-up procedures

- Resources provided/resources required
- Integration with SCF's existing systems, procedures and databases
- Assisting with or completing data conversion and mapping from existing system to vendor system
- Implementation, Transition, Start-up

Describe the options for configuring the application

- Standard (Live), training, Development, Testing

Define who has responsibility for maintaining customization changes/versions

- Specify if customizations be overwritten in an upgrade
- Identify your custom scripting capability

Provide a list of:

- Available APIs, including reference documentation
- Systems/Providers that you have a standard interface with
- Explain how you manage additions to this list and who pays for the addition

## Mobile

Describe your mobile capability as part of each of the other sections inside this RFP

- Describe your mobile strategy
- Explain how your mobile capabilities are created
- Indicate if your mobile capability is a native app or a responsive design. If native, explain what OS is/are supported
- Specify what is the feature parity between the mobile app and the desktop offering? (what can/can't you do from a mobile device vs. the desktop)
- Signify your special security systems for Mobile: Finger print/Touch ID, facial recognition, VPN, etc.

There are mobile workers within SCF

- Illustrate how your mobile systems will enable their work
- Indicate if you support geo-fencing capabilities/GPS recording
- Define what apps must be loaded on SCF/employee's hardware to enable mobile functions

## General HR Processes

The core of the user group and the primary need for this installation is to improve the Core HR functions… Review how your system will provide the highest success in each of these areas.

- The ability to deliver data, forms, approvals and processes flows for recruit to hire to onboard to promote to train to retire/term work flows.
- Templates/reports

- Ability to create (templates/examples/guidelines) Org Charts with approvals and security controls
- Work Flow processes. Givens, adaptable
- Automatic Organization information system updates
- EEOC/ACA/OSHA/NA/AI tracking and reporting
- CRM – MS Outlook interface
- Interface with emails from within the HCM/TAS vs. logging out and into email
- Electric PARs with approval workflow
- Ability to track education and experience
- Move toward paperless flow

Review the ability to configure organizational structures/charts by Country, Division, Department, Location, Functional Groups.

- Automatic/Real Time Organization Chart Creation and updates
- Work Flow processes. Givens, adaptable
- Role based security/Protected visibility at every level: Individual, Manager, HR, C-Level, etc.
- Drill down from within an Org Chart: Organization, Manager, Location, Phone Number, e-mail, etc.
- Describe the process to make mass changes to Org Charts: Re-Organization, Manager/Leader changes, Acquisitions, etc.
- Explain if Org Charts may be printed without add on software

Describe how Leaves of Absences are managed within your system

- FMLA, Education, Short & Long term Disability, Sabbatical, etc.
- Specify how these integrated with other systems: Payroll, Benefits, Performance, etc.
- Identify how notifications/alerts/workflows are managed within the system

Describe how your system monitors workers' compensation and the related leave of absence.

Describe the way you manage Vacation, Sick Leave, Paid Time Off, etc.

- At the employee, manager and HR levels

Outline the termination process within your system

- Workflows/Approvals/Notifications
- Integration with other systems: Payroll, Asset Management, Security, Time/Attendance, Benefits, COBRA, Leaves, Active Directory, etc.
- Re-hire processes
- Exit Interview processes
- Termination Reason tracking
- Potential for re-hire

Relate how your system manages contingent labor

- Contractors, Temporary, Interns, Volunteers
- Describe the interface with other systems

Describe how positions are managed

- Position control/position management
- Attributes that a position can control
- Minimum requirements for a position
- Recommendation for a position management design where we have multiple employees assigned to 1 position and are assigned to different divisions, department and locations
- Explain the relationship between jobs and positions

- Define attributes that a job controls

Clarify how the system will pre-populate additional areas (such as):

- Personal Action Requests
- Training
- Benefits

## Content Management

Define how your system handles

- Archiving
- Building Forms
- Digital Document imaging
- Document and Record Retention
- Document management
- Full text and Meta Data Searches
- Signing and Versioning

## Training

SCF has a separate Learning Management System (LMS)

- Describe what LMS functionality is included.

As part of the installation and start-up please address:

- The typical learning curve for key areas
  - Employee, Manager, Super User, IT, HR, etc.
- Training you provide and how much
- Training materials (Online, videos, manuals, etc.) provided
- Cost
- Define any limits by hours or subject
- Identify any area which is contracted out and who you recommend

Define ongoing training management

- New SCF people on the same system
- For System changes/upgrades

## Reports

Describe how reports are created

- Initial writing, new, on-going changes
- Templates, Definitions
- User defined and build outs
- Integrated report writing capability

Describe how users will have access to standard reports.

- Dashboards, templates
- Create new reports/analytics and add fields - self-service
- Detail your service to assist or create more complex reports

Define the import/export formats

- Excel, Word, PDF, other
- CSV, XML, other

Describe how security is maintained and centralized

- Standard reports
- Ad Hoc reports

Specify how the system maintains employee hierarchy.

Differentiate the functionalities available to various levels of employees for accessing data.

Describe the capabilities of reporting and analyzing human resources and information.

Outline Organizational Charts capabilities:

- Solid line / Dotted line
- Division/Department/Location
- Per employee w/multiple positions

Integrating with Finance:

- Interface with Serenic Navigator
- Relate how your system assist with analysis and reporting on assets

## Customer Service

Provide details on your Customer Service support

- Access via phone, email, chat, text
- Available times… 24/7
- Limits on your customer service (hours, topic, months after implementation, etc.)
- Charges/pricing for ongoing Customer service
- Response time to each mode of contact
- Where your customer service organization based
- Clarify if you provide single source customer service contact for different modules, e.g.: Recruiting, Benefits, HR, Timekeeping
- Ability to have consistent point of contact relationship, i.e. Same support team assigned to SCF
- When you provide on-site customer service support

There are several Customer Service rating programs. Please cite which are important to you and how you rate in them.

Review your customer renewal rates.

## Implementation Processes

SCF is in full operational mode with a limited amount of available resources

- Define your preferred implementation process
- What pre-Installation services do you provide

Distinguish who you use for the actual installation.

- Describe your implementation team: Leadership, project manager, developers, troubleshooting, trainers, data and process transition, project management, customer service, etc.
- Your employees or contractors
- Explain the benefits/risks with your model

It is anticipated there will be a Phased Approach to implementation

- Identify your method of orchestrating a Phased Approach
- Pre-Implementation processes, assistance, forms, etc.

### Transition Processes

Describe your transition processes

- Mass data Transfer/formats
- Special Requirements required
- Typical time required

### Out of Scope at this time

SCF is taking a phased approach to their system changes. There are several systems that a full HCM installation can manage that will not be included during this phase. Those are listed below. If SCF will encounter significant efficiency, pricing or quality losses please provide commentary.

These areas are not part of this immediate installation:

- Full Payroll management: However, bi-directional feeds with Serenic Navigator and other systems will be required
- Performance Management: Bi-directional feeds with SCF created systems
- LMS: Bi-directional feeds with SCF created systems
- Expenses: Concur is SCF's Expense and Travel management process, all systems must have bi-directional feeds
- Asset Tracking: how aligning certain materials/items with employees (computers, phones, etc.) might be appropriate
- Project Tracking

## Pricing Model:

Define your pricing model for each step of the process:

- Purchase
- Project Scope definition/Clarification
- Start-up
- Implementation
- Transition
- User Acceptance Testing
- Training
    - Initial
    - On-going
- Updates/Upgrades

- Customization
- Customer Service
- On-going costs; maintenance, upgrades, changes, training, etc.
    - Is there a difference in costs for longer subscriptions?  Please explain.
- Reports: Templates, Creation, One-offs
- Learning Management module (LMS), please show if cost is separate or included in total cost.

Delineate your invoicing and payment methods

- Initial payment
- Ongoing payment timing and amounts

## Timeline:

As with all HCM/TAS projects, timing is always an issue. Define a typical timeline

- Start Date from contract signing
- Provide a definition and anticipated timing for each step along the way
- Describe your approach, sequence and timing that maximizes the efficiency (speed and cost) of the installation and minimizes conflict, downtime, manual systems, etc.
    - TAS
        - Internal
        - Candidate experience
        - Transition
    - HCM
        - HR/ER
        - Payroll
        - Time and Attendance

Please provide a detailed implementation plan and targeted dates for completion of key tasks that will be included in the initial roll-out and implementation.

## Must Provide:

- References
    - Healthcare, Governmental, similar size
    - Un-facilitated/unmoderated reference checks
    - Experience in Alaska owner/based organizations
- Implementation, transition, training and start-up time line
- Test and go live procedures
    - Stage gate processes
- Communications plans for
    - Training, implementation, transition, guidelines
- Mobile applications
- Documentation
- Ongoing Training and Customer Service

# SCF Required / Preferred Reports

**Updated** **4/12/2017**

## Payroll

**Must Have**

- Active Employee List
- Employee Status
    - Exempt / Non-Exempt
    - Full-Time / Part-Time
        - Employees by FT equivalency (FT 1.0, FT .8, FT .6, etc.,)
- Time by Pay Code
    - Salary, Hourly, Daily, etc.
    - Regular, Overtime, Holiday, Bereavement, Leave of Absences, etc.
- Time by
    - Manager, Department, Group
    - Date Range (variety of prompts)
        - Department, Manager, Position, etc.
    - Absences by Date Range
        - All Absences or Specific Absences
- Timesheets
    - Approved / Unapproved
    - Certified / Uncertified
    - Missed Punches
- Scheduling
    - Employee List Flexible Work Schedules
    - By Date Range (weekly, bi-weekly, monthly)
- Timekeeping Table Set-up Reports
- Timecard Audit
    - Date Range
    - Prompts for User (including Employee)

## Background & Credentialing

**Must Have**

- Termination
- PSV Null
- EPLS/OIG
- Background Null
- Ad Hoc
    - School, University
    - Degree(s)
    - Name, Position, Department, Division
- Ethnic
    - CIRI Shareholders

## Data Services

**Must Have**

- Employees
    - Status (Active, Inactive, Termed)
    - Hire Date / Rehire Date
        - Within 6 months

        - Per Month
    - Division / Department
    - Position Title
    - Badge ID
    - Ethnic Code
    - Name Changes
        - First, Middle, Last (old & new)
        - Effective Date
- Alaska Native/American Indian (ANAI)
    - Hires / Employees / Turnover
        - Division / Department / Job Category
        - Number of Ethnic Code Hired / Count of All Hires
- Change Report
    - Transfers
    - Promotions
    - Demotions
    - Status (Full/Part, Intermittent, etc.)
    - Division / Department
    - Employee ID
    - Position
    - Reason
- Report for IHS Loan Repayment (Nurse & Physician Assistant)
    - Budgeted
    - Filled
    - Newly Hired
    - Total Termed
- Employee Corrective Actions
    - Start Date
    - Resolution within 24 hours
- Employee Events Privacy Violations

**Wish List**

- Immunization
    - select that are required by position
- Headcount in Date Range
    - Status (Full-Time, Part-Time, Temporary)
    - Ethnic Code
    - Position
    - Department
- Change Report
    - See History
- Historical Profiles Segmented in Various Ways
    - Position
    - Status
    - Hire Date(s)
    - Term Date(s)
    - Date Range
- Chronological Hire/Term Dates
    - In Order
    - Related Positions
- A Field to add additional IDs (EHR ID to link w/Finance)
- Administrator Report

Lists Division, Department, Leadership to fall under Administrator
Matric Report
Dotted Line
Dynamic Organization Chart

**HRIS**

**Must Have**

Employee Missing ID's
Null BCU
Null ICPA
Null License/Certification
Audit Reports on Database Org Structure
System Set-up Audits
Worker's Comp Audits on position set-up vs. employee
FMLA Audit
Division/Department/Location/Position Codes
Birthdates & Anniversaries
by Division/Department
Non-employee Start Date
Previous Name
Ethnicity
Employee Count by Division/Department
Org Code Department/Managers
Employee Position Accredited Campus
Position License Certification Required
Events
Service Obligations
Sign-on Bonuses
Promotions
Cleanup Suffix
Annua HR Movement
Turnover by Department
Longevity by Division/Department
Reports to Supervisor
Supervisors
Base 2
Position Code/Job Grade by Employee
Merit Increase Audit
Health Provider Readiness

Wish List
List of Labor Levels
Audit for System Config & Data Entry Issues
*Ability to Write & Publish for Users Dashboards

**Compensation**

Must Have
Report Weekly
Identifier (EEID)
Division
Full Name

- Position Code
- Job Title
- EE  exempt Status
- Regular Hours (work week)
- EE Status (full/part/loa, etc.)
- Pay Frequency
- Position Change Date
- Last Hire Date
- Original Hire Date
- Paygrade Assigned
- Pay Type (base/secondary position)
- Pay Rate
- Ethnicity
- Gender
- Birthdate

Report Monthly
- Hours Worked
- Overtime
- Overtime Cost

Annual Reports
- Total Earnings
- Total Paid Time Off Accrual
- Employer 401k Contribution
- Total comp statement
- ACA Reporting

**Benefits**

Must Have

Hours Report
- Name
- ID
- Hours
- Hire Date (most recent)
- Status

Address Change
- old address
- new address
- effective date

Status Change
- old status
- new status
- effective date

Benefits Integration File
- benefit elections w/deduction amounts on one line
  - comma separated values file
- 1095-C updates
- 1094C
- Benefit Changes
  - time range to show just those changes
- Dependent Report

**Recruiting**

Vacancies filled by position and department
How many jobs are open- sorted by title and department
How many applications were sent to the hiring manager- sorted by title and department
List of applicants who applied, but were not sent to the hiring manager
Jobs filled by recruiter
Offers accepted/easy to sort by position titles
Offer declined/easy to sort by position titles
Reason why offer was declined
Time to fill by position title/job open date/job closed date/days filled or not filled
Missing onboarding documents by new hired employee
Turnover report by position/ easy to sort by position
Filled by option *Source * or referral by position not one big massive report to drill down information
Internal equity report by position/hired to include with salary information relocation or sign on bonus offered
Report Alaska Native and American Indians who've applied in the last 90days with a degree and without a degree
How did you learn about this job opening report….
Easy Extend Offer Report
Open vacancy report by position title/ department or total number of budgeted job titles by department
NHO Week Log/Report
Ability to create reports without going through vender
Internal Equity Report
Missing onboarding documents report and automated reminders
Retention report that includes ability to sort by (sortable by multiple fields):

- Position
- Department / division
- Specific time frame
- Termination Reason
- Recent hires
- Recent declines and decline reasons
- Candidate source summary
- Number of applicants
- Number of current employees

Termination report sortable by:

- Position
- Department
- Reason left

Manager application review / not reviewed
Offer report
Centralized panel waitlist report
Weekly divisional email report
AN/AI percentage reporting
Positions by recruiter
Positions by length of time open – Average Time to fill
Password retrieval
Report sortable by applicant status

- Position
- Department

Dispositions
Referral bonus – who got one and when service obligation expires
Sign on bonus – who got one and when service obligation expires
Relocation - who got and when service obligation expires
Mailing list report

- By position

- Department

Report of all active reqs
All pending reqs
All cancelled reqs
Integration error logs (if two systems are selected and integration is required)

## SCF RFP Human Capital Management (HCM) and/or Talent Acquisition System (TAS)

Response to Vendor Questions – Version 1 Updated: 05/09/2017

Southcentral Foundation

| General: | | |
|---|---|---|
| **Ref Code** | **Query** | **Response** |
| 10a | Number of Employees? | 2,229 |
| 10a | Number of Locations? | 41 |
| 10a | Number of States? | Alaska and Washington: States we have ee's working in?<br>Louisiana Illinois North Carolina Montana<br>Vermont Wisconsin Pennsylvania Utah<br>Indiana Idaho Colorado South Carolina<br>Hawaii Oregon Arizona<br><br>The list is likely to grow and time and attendance systems must support state DOL regulation for employees working remotely in other states. |
| 10a | Number of State IDs? | We have 2 state ID's and are currently filing payroll tax returns in 17 states and don't expect that number to decrease. |
| 10a | Number of Legal Entities? | 1 |
| 10a | Number of Local IDs? | Approximately 10 |
| 10a | Number of Locations from which payroll is processed? | 1 |
| 10a | Number of Pay Groups?<br>(groups of ee's by pay frequency or payroll (processing groups) | 10 but likely to grow |
| 10a | Number of Departments Across the Organization? | We have 41 Locations<br>We have 120 Departments |

| | | |
|---|---|---|
| | | |
| 10a | Number of Job Codes? | • Job Codes to SCF = Pay Grades plus category. We have 91<br>• Pay Grades 32<br>• Positions 4166<br>• Evaluation Groups 12<br>• Job Categories for Accreted Campus 14<br>• Job Categories Report Categories 11 |
| 10a | Number of Collective Bargaining Agreements or Unions? | N/A |
| 10a | Number deferred Compensation plans? (Pensions, 401k, Roth, etc.) | Total of 2: 401k and 457b.<br>They are currently not housed in our HRCM initially. |
| 10a | Number of Imports required into New System? (elections, bonuses, LMS, etc.) | 2 |
| 10a | Number of GL Exports Required?<br><br>This is typically 1 file format to integrate the General Ledger data to their financial system. If the client has multiple financial systems or a different chart of accounts for each EIN, then we would setup multiple GL files. | At this time, the payroll module will not be a part of the HRIS project; therefore, no General Ledger export is required.<br><br>There will be an export required for a time file from the Time and Attendance system to the existing payroll system that allows us to process payroll and pay employees in our existing system.<br><br>There is a need to export employee and employer benefits data from the HRIS system to our existing payroll system.<br><br>There is also a need to import leave accrual balances to the Time and Attendance system after payroll is processed and accruals are calculated in our existing system.<br><br>There will need to be an import file from our existing payroll system to update employee pay statements and Form W-2's from our existing system. |
| 10a | Number of 3rd Party Exports Required? (LMS, ERP, Data Warehouse, etc.) (list) | 5 |
| 10a | Number of Entitlement Policies? (vacation, sick, PTO, etc.) | 1 - PTO |
| 10a | Number of Payroll Codes?<br>- Types of pay such as Regular, Exempt, | 371 current payroll codes that include deductions, earnings, taxes and accruals. |

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| | Non-Exempt, Holiday, FMLA, etc.<br>- A payroll or Deduction Code would be regular, vacation, sick, OT, bonus, commission, 401k, united way, medical, dental, etc. | |
| 10a | Number of 3rd Party Payees? | 75 - 100 or more in any given year |
| 10a | Number of Wage Attachments? | 25 |
| 10a | Number of Bank Accts per Legal Entity? | 1 |
| **Current Systems in Use (data & document management):** | | |
| **Ref Code** | **Query** | **Response** |
| 10ab | Current Recruiting System? | Healthcare Source |
| 10ab | Current Human Resources System? | Kronos |
| 10ab | Current Benefits Administration System? | We do not currently have a separate Benefits Administration System. |
| 10a | Current Compensation Management? | Kronos |
| 10ab | Current Payroll System? | Serenic Navigator |
| 10ab | Current Time System? | Kronos |
| 10ab | Current Scheduling System?<br>(spreadsheets, stand-alone tool, etc.) | Some departments use very complex spreadsheets in addition to Kronos scheduler.<br><br>Via Kronos:<br>• Some SCF departments utilize Kronos Advanced Scheduler. It is used to ensure coverage for shifts by position, by location; e.g. number of Dental Assistants at the Fireweed bldg.<br>• Scheduling is used through our Employee Self Service to request time off and swap shifts.<br>• Scheduling groups by supervisor.<br>• Shift Templates<br>• Call list to fill shifts.<br>• Open Shifts that need to be assigned to staff. |

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| | | • Hours/Volume analysis<br>• Posting Schedules<br>• Audits and reports. |
| 10b | Current Learning Management System (training)?<br>Is this in scope to be replaced? | The current LMS was built in-house and is currently under review for potential replacement. If the LMS features within the HCM are a good fit, we would consider migrating it. |
| 10ab | Current Financial System? | Serenic Navigator |
| 10ab | Other Systems related to HR/Payroll? | None other than Serenic Navigator |
| **Time & Attendance** | | |
| **Ref Code** | **Query** | **Response** |
| 10a | Number of Pay Policies?<br>Pay policies that define holidays, OT, shifts, pay/work rules, etc. How many different policies you have? | Encompassing what is described above; approximately 60-75 pay policies. |
| 10a | Number of Punch Policies – rounding, grace time, rules on time punches. | We round to the 15 minutes, and allow for 7 minutes of grace time on the in and out punches. |
| 10a | Number of Shift Rotations? | SCF has 24/7/365 work shifts. The number of shifts is in the hundreds and there are approximately 75 shift patterns. We expect the number of shifts and shift patterns to continue to grow. |
| 10a | Number of Attendance Policies?<br>(if applicable for points/disciplinary action) | We round to the 15 minutes, and allow for 7 minutes of grace time on the in and out punches. |
| 10a | Shift Trading? | Yes |
| 10a | Number of Clocks. Need to replace? | 61 in current use. An additional 10-12 clocks will be needed by time of conversion. All will need to be replaced |
| 10ab | Type of Clocks? | Prefer iPad device clocks but accept Vendor proprietary clocks. Clocks must include badge swipe and/or user touch screen input and must store badge swipes or data if Time and Attendance system is down. |
| 10a | Rent or Purchase Clocks? | Purchase |

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| **Benefits Administration** | | |
| **Ref Code** | **Query** | **Response** |
| 10a | Number of Benefit Carrier Exports required? (List) | Guardian (dental, vision, vol life, vol add, and group insurances), Professional Benefits Services (DC FSA and HC FSA), TIPS (FEHB medical), Basic (COBRA Administration) |
| 10a | Number of Benefit Plans Required? (List) | 19 medical plans with three premium tiers each and three coverage levels for each tier.<br>Three medical plans need HSA's set up. Dental, Vision, DC FSA, HC FSA, Voluntary Life for Employee, Spouse, Children, Voluntary ADD for Employee, Spouse, Children. Group insurances for Regular Full Time employees (life, AD&D, STD, LTD). EAP. |
| 10a | Variable employees to be measured for ACA? | Yes. We need to measure whether our Intermittent employees are working an average of 30 hours weekly over a three-month period to determine whether we need to make an offer of coverage. |
| 10a | COBRA Administration? | We have an outside vendor currently but would be open to hearing about COBRA admin within an HRCM |
| 10a | HSA/FSA Administration? | We have an outside vendor and want to keep it outside. |
| **Hardware / Software** | | |
| **Ref Code** | **Query** | **Response** |
| 10ab | Standard/minimum requirements (to access compatibility & suggest upgrades) | • Support for IE11 and Chrome, preferably with no required plugins (such as Flash or Java)<br>• Mobile support for iOS and Android devices<br>• Single Sign-on for Azure Active Directory authentication<br>• Upgrades/enhancements: we are looking for the vendor to suggest if upgrades are required on our end to prepare for implementation to their solution |
| 10ab | List existing systems, procedures & databases targeted for integration | • Internally developed Line of Business applications which will need a variety of push/pull API integrations implemented by SCF resources.<br>o Offline badge scanning tool for attendance at corporate-wide events<br>o Annual Planning Tool – app for managing the strategic planning process<br>o Committee Manager – app for managing the functional committee |

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| | | process<br>o LMS – currently in-house, could transition to the HCM if it meets the need<br>o Annual Reorientation – part of the LMS that conducts a program of required courses annually for employees<br>o Customer Satisfaction Survey – in-house survey tool for measuring customer-owner satisfaction<br>• SCF Data Mall is an internal, centralized reporting environment which receives feeds from various systems, including our current HCM<br>• Incident/Accident Management software<br>• Occupational Health Management software<br>• Serenic Navigator for financial integrations<br>• Talent Acquisition Management (if separate from the HCM)<br>• Benefit export |