



REQUEST FOR PROPOSAL

#RFP-2021-11

PROJECT: HUMAN RESOURCES INFORMATION SYSTEM

The Authority is issuing this Request for Proposals for the procurement, implementation, and management of a Human Resources Information System

**PROPOSALS DUE: FRIDAY, MAY 28, 2021
BY 5PM PACIFIC DAYLIGHT TIME**

Request for Proposals Human Resources Information System

BACKGROUND & SCOPE OF WORK

PURPOSE OF REQUEST FOR PROPOSALS

The Santa Clara Valley Open Space Authority ("Authority") is soliciting proposals from qualified vendors to procure, install and maintain a Human Resources Information System.

BACKGROUND

The Authority is an independent special district created on February 1, 1993, by an act of the Legislature and is governed by a seven-member elected board of directors. The Authority serves a large portion of Santa Clara County by protecting sensitive lands, preserving natural communities, and managing open space. The Authority has preserved over 25,000 acres, which include three preserves with over 20 miles of trail. Activities on the preserves include hiking, cycling, horseback riding, and nature study.

The Authority has a staff of 47 employees, throughout 5 departments. Current human resources systems include ADP Workforce Now for payroll processing, Acumatica for timecards (this system is the Authority's ERP), and tracking spreadsheets for a variety of functions.

The Authority offers medical, dental, vision, life insurance, supplemental insurance, CalPERS (Classic and PEPRA Members), a 457 plan, and a 401a plan. For Paid Time Off, the Authority provides: accrued vacation leave, accrued sick leave, awarded personal leave, earned compensatory time off for non-exempt employees, and awarded compensatory time off for exempt employees. The Authority provides other paid leaves such as bereavement leave and jury duty pay, as well as honoring requests for unpaid leaves of absence.

OBJECTIVES

The Authority would like to procure a Human Resources Information System (HRIS) to provide all employees, supervisors, and Human Resources staff with streamlined access and management of employment information and processes. As the Authority staffing levels have increased over the last five years the previous systems are no longer keeping up.

SCOPE OF WORK

The scope of work for the HRIS project includes the following functionalities: Human Resources, Payroll, Time and Attendance, Position and Pay History, Talent Management, Benefit Administration, Talent Acquisition (e.g. Recruiting, Onboarding), Employee Self-Service, and Reporting. The functions listed below are all desired by the Authority, however the Authority welcomes proposals that can provide any combination of these functions.

The Authority is looking for a single vendor who can provide the licensing; support implementation, integration, and training; and provide ongoing support.

Desired Functions

1. Human Resources
 - Record basic demographics
 - Organizational structuring
 - Accommodate 100 employees with option to grow

- Policy and forms library
- 2. Payroll
 - Integration with ADP Workforce Now, the Authority's current payroll platform, and Acumatica, the Authority's ERP (Accounting and Timecards), **or**;
 - Ability to process bi-weekly payroll with various payrates, taxes, and several deductions/earning codes; including the remittance of payroll taxes to state and federal agencies, taxation support for the Authority, and;
 - Generate manual/off cycle checks, and;
 - Ability for direct deposit and live checks in same payroll cycle, and;
 - Access to paperless paystubs for employees.
- 3. Time and Attendance:
 - Paid Time Off
 - Track multiple paid time off programs, with multiple accrual or award levels
 - Automate time off request/approval transactions between employees and supervisors, with options for multi-tiered approval
 - Have ability to manually enter in transactions
 - Make balances available for staff and supervisors to review or distribute notification of accrued balances to employees
 - Leave Administration
 - Ability to track leaves of absence following State or Federal Leave Laws
 - Notifies user when leaves are close to expiring
- 4. Position and Pay History
 - Ability to track historical data for employee pay and position, including:
 - Reason for change
 - Status changes, such as Full-time/Part-time or Regular/Temporary
- 5. Talent Management
 - Provide tools to track and facilitate the annual performance evaluation process
 - Hold templates for necessary performance evaluation forms
 - Hold completed performance evaluation documents, available for employee, supervisor, and human resources to access
 - Store other performance-based documents, such as performance improvement plans, written warnings, and praise or complaints received
 - Track training completed, skills possessed, and education credentials
 - Track and notify staff and supervisors of training renewal dates
- 6. Benefit Administration
 - Ability to administer and track employees participating in medical, dental, vision, and supplemental insurance programs
 - Ability to administer and track participation in life insurance, CalPERS retirement (i.e. formula), supplemental insurance programs
 - Affordable Care Act tracking
 - Track compensation limits for CalPERS retirement, 457b, and 401a contributions at all levels
- 7. Talent Acquisition
 - Recruitment:

- Applicant tracking system that allows for direct communication, collection of resume/application documents, questionnaires to be sent to candidates, interview scheduling, and templates for communication
 - Statistical reporting on recruitment efforts and outcomes
 - Onboarding:
 - Preparation of offer letters using standard templates
 - Collection of required forms, including digital signature
 - Scheduling of onboarding training sessions, with integration to Microsoft Outlook for calendar
 - Central location for onboarding checklist to monitor that actions are taken by Human Resources, the supervisor, the new hire, or other Authority staff/trainers
8. Employee Self Service
- Ability for employee to query data
 - Ability to print and view paystubs and W2s
 - Ability to make Open Enrollment changes
 - Add/delete dependents, including submitting supporting documents if necessary
 - Change medical plans
 - Ability for employee to make changes
 - Address/phone
 - Emergency contact
 - Direct deposit
 - W4 withholding
 - User friendly interface on the computer, a mobile app feature would be an added benefit
9. Reporting
- Robust reporting system that is intuitive to the user and easy to create reports
 - Basic employee information (i.e. phone number, birthday, years of service)
 - Benefit related reports on employees
 - Benefit summaries by employee
 - CalPERS and 457b contribution reports
 - Attendance transactions and leave time balances
 - FMLA/CFRA tracking
 - ACA reporting
 - Quarterly and Year End tax reports with ability to submit online
 - COBRA required notifications
 - Ability to export information into Word and Excel documents (i.e. offer letters)
 - Creation of Ad Hoc reports

SUBMISSION, REVIEW & SPECIAL CONDITIONS

PREPARATION OF RESPONSES

All responses to the items in the REQUIRED INFORMATION section must be answered fully and must be able to be substantiated by the vendor.

KEY DATES*

Event	Tentative Date
Request For Proposals Issuance	04/30/2021
Vendor Questions Due	05/12/2021
Addenda Posted	05/19/2021
Vendor Responses Due	05/28/2021 by 5:00 p.m.
Review of Submissions	06/01/2021
Award Bid	07/08/2021

* Dates subject to change

SUBMISSION OF RESPONSES

Proposals must be delivered by email (with attachments, if any) to the following email address: proposals@openspaceauthority.org, with the following language in the subject line of the email "Attention: RFP-2021-11 re: HRIS":

Proposals will be received only at the email address identified above. All proposals must be received by email by the Authority prior to 5:00 p.m. May 28, 2021. Proposals will not be accepted via fax, mail, or by courier. Late responses will not be considered.

- A. Mail and facsimile responses will not be considered. Vendors shall have sole responsibility for delivery of responses on time and to the proper email address.
- B. Response Format:
To facilitate the analysis of responses to this Request for Proposals, vendors are required to prepare their responses in accordance with the instructions outlined in this section. Each vendor is required to submit the responses in a sealed package. Vendors whose responses deviate from these instructions may be considered non-responsive and may be disqualified at the discretion of the Authority.

Responses should be prepared as simply as possible and provide a straightforward, concise description of the consultant's capabilities to satisfy the requirements of this Request for Proposals. Emphasis should be concentrated on accuracy, completeness, and clarity of content. All parts, pages, figures and tables should be numbered and clearly labeled. No page limit, however, responses should be comprehensive, succinct and direct. Font size should be no less than 11 points.

- C. Note: Any deviation from the requirements listed below may result in the response being considered non-responsive, thus eliminating a vendor from further consideration.

- D. The Authority cautions vendors to assure actual delivery of mailed or hand-delivered responses directly to the address noted above by the established deadline. A response received by the Authority after the established deadline will not be considered.

REQUIRED INFORMATION

1. **Executive Summary:** This part of the response should be limited to a brief narrative highlighting the vendor's response. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel. The Executive Summary should not include cost quotations.
2. **Required Questions:** The vendor must include comprehensive answers to the Required Questions Attachment A. Response may include tables, charts, etc. Answers must be comprehensive and concise while providing enough detail that Authority staff will understand.
3. **Pricing Schedule:** The vendor must include a pricing breakdown of costs for licenses, installation, implementation, training, etc. Pricing schedule should also distinguish recurring and non-recurring costs.
4. **Pre-Recorded Demonstration of the Product:** The vendor may include links to pre-recorded demonstrations of the product. Do not include links or information other than directly related to the RFP criteria.
5. **3rd Party Product/Additional Products:** If the proposed solution includes other 3rd-party software where additional licensing may be required, or that other software is used to provide a functionality in part or whole, please list.
6. **Client References:** Vendors should provide a list of at least three (3) installations in California. Submit references for fully-completed installations to the extent possible or note the current status of partially-completed installations. List the "breadth" of the software solution and the version currently operating.
7. **Statement of Agreement with Terms of Contract:** The consultant must provide a statement that indicates agreement to the terms of the contract including an agreement to meet the insurance requirements.

SELECTION CRITERIA

Proposals will be evaluated by Authority Staff and a proposal may be recommended for approval by the Board of Directors. Proposals will be evaluated for completeness of response and quality of response; the extent to which the Bidder's proposal fulfills the Authority's stated requirements as set out in the RFP; proposed fees and rates; relevant experience of the vendor, and previous client satisfaction. In determining the most responsible and qualified proposal that best fits the need of the service contract, the Board of Directors may use the following criteria to evaluate submitted proposals:

1. Experience of the Bidder, including past performance of the firm on contracts of similar size and scope;
2. Experience and qualifications of personnel employed by the Bidder;
3. Demonstrated understanding of the scope of the service;
4. Best overall financial return to the Board of Directors on the contract; and,

A responsible Bidder who has demonstrated the attribute of trustworthiness, as well as quality, fitness, and experience to satisfactorily perform the work or provide the goods required. Staff may conduct

interviews or product demonstrations as part of the selection process. The Board may reject all proposals.

ADDENDA

Authority will post any addenda on Authority's website and notify properly registered vendors of such postings. Consultants shall be responsible for ensuring that all addenda are included in their responses.

REJECTION OF RESPONSES

The Authority may reject any proposal if:

1. The vendor fails to respond to the RFP Required Information, or otherwise comply with the format and submission required set forth in this RFP, or
2. The vendor misstates or conceals any material fact in the response.

The Authority may reject all nonconforming, non-responsive or conditional proposals, and may waive any minor informalities or irregularities in any proposal and at the Authority's sole discretion.

VENDOR QUESTIONS

Any questions about this RFP shall be submitted in writing to proposals@openspaceauthority.org on or before May 12, 2021 at 5:00 p.m. PDT. Agency will post written responses to questions and email answers to vendors no later than May 19, 2021 at 5:00 p.m. PDT. Any addenda necessary as a result of questions or clarifications will be posted and delivered to all registered vendors no later than May 19, 2021 at 5:00 p.m. PDT. Responses may be posted incrementally as received.

PUBLIC RECORDS LAW

Pursuant to the California Public Records Act (California Government Code Section 6250 and following), public records are open to inspection at all times during the office hours of the Authority and every person has a right to inspect any public record or request copies of public records. All submitted responses are public records and are subject to public disclosure pursuant to the California Public Records Act.

ACCEPTANCE

Submission of any response indicates acceptance of the conditions contained in this Request for Proposals.

RESPONSE COSTS

Those submitting responses do so entirely at their own expense. The Authority will not be responsible for reimbursement to any individual or firm for any costs incurred in preparing or submitting responses, providing additional information when requested by the Authority, or for participating in any selection interviews or meetings.

NON-DISCRIMINATION

No person shall be excluded from participation in, denied any benefits or otherwise discriminated against in connection with the award and performance of any contract on the basis of race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, sexual orientation, age

(over 40), military and veteran status of any person, or any other non-merit factor unrelated to job duties and protected by law.

List of Attachments

Attachment A – Required Questions

Attachment B – Contract Template