**REQUEST FOR PROPOSAL**

**FOR**

**PAYROLL/ HCM SOLUTIONS**

**AT**

**MAYA ANGELOU PUBLIC CHARTER SCHOOL/**

**SEE FOREVER FOUNDATION/**

**PROPOSALS MUST BE UPLOADED TO:**

**https://app.smartsheet.com/b/form/369916b465ab4b658f381a5a7d7f3ca4**

**NO LATER THAN 12 NOON ON MAY 31, 2022**

**MAYA ANGELOU PUBLIC CHARTER SCHOOL /SEE FOREVER FOUNDATION/**

**REQUEST FOR PROPOSALS**

**Payroll/HCM Solutions**

**OVERVIEW OF FACILITY**

See Forever Foundation/ Maya Angelou Public Charter School (MAPCS) is located at 5600 East Capitol Street NE, Washington DC 20019. Our mission is to create learning communities in lower income urban areas where all students, particularly those who have not succeeded in traditional schools, can succeed academically and socially.

**INTENT AND DEFINITIONS**

a. The term “MAPCS” means Maya Angelou Public Charter School **and** the See Forever Foundation.

b. The term “contractor” or “bidder” means the responsible bidder. The term “successful contractor” or “successful bidder” refers to the bidder awarded the contract.

c. The intent of this solicitation is to procure financial, accounting, and compliance services at a fixed price.

**SCOPE OF WORK**

MAPCS is soliciting proposals to establish a contract with one (1) qualified and experienced vendor to provide a single, robust integrated enterprise Human Resources Information System (HRIS) solution. The current vision is to streamline our day to day activities, eliminate unnecessary tasks and house all our current HRIS needs in one system, while maintaining data integrity and efficient end user functionality.

This solution should cover all keys areas including:

1. Payroll
2. Time and attendance
3. Benefits Administration
4. Recruiting / Applicant Tracking
5. Onboarding
6. Position Management
7. Performance Management
8. Compensation Management
9. Learning Management
10. Expense Management
11. Reporting & Analytics
12. Compliance
13. Employee Engagement
14. Mobile

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 MAPCS 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.

**GENERAL REQUIREMENTS**

**Company Overview:**

**Background**

1. Provide a brief history of your firm.
2. Describe your company culture.
3. What is your primary business focus?
4. Has your company received any recent industry awards?
5. Provide company brochure/literature/whitepapers if available.
6. What separates you from your competition?
7. Please describe your most recent accomplishments over the last year.

**Customer Base**

1. How many clients do you serve?
2. What is the average size of your customers?
3. What is your client retention rate?
4. Did you gain your current client base organically or through acquisition?

**Financial**

1. Are you public or privately held?
2. Provide evidence of the financial stability of your firm.
3. If public, can you provide public filing reports from the past 5 years, if requested?

**Development and Deployment**

1. How much do you invest back into your product annually, as a percentage of revenue?
2. How does your company stay current with technology?
3. Is your product developed in-house or by third-party?
4. How do you roll out new upgrades or products to your clients?
5. Are all clients on the same version of the software or are a percentage on older versions without updating?
6. What is the minimum and maximum amount of time between software releases recommended before we upgrade?
7. How do you prioritize your product development roadmap?
8. To what extent are current customers involved in providing user feedback for product development?
9. Do you have any user group quality initiatives? Please describe.

**Technology:**

**Architecture**

1. How modern is your technological architecture?
2. Did you develop your entire platform or have you acquired parts? Please describe in detail which were developed in house and which were acquired and adapted.
3. Who are your product partners?
4. Is your product scalable for the future?
5. Is your product an open or closed architecture? Please describe.
6. Provide a high-level technical architecture graphic of the proposed solution.
7. How many administrators can we have in the system?
8. Are there any components that are loaded on the client that we would not have access to modify/view?
9. Is your system architecture comprised of a single or multiple databases? Are there third-parties?

**Integration**

1. Do you have the ability to integrate with any best-of-breed solutions, wherever possible? Please describe any limitations.
2. Does the system allow programmatic access (Read) to data via an API?
3. Does the system allow programmatic updates (Write) to the data via an API?
4. If the system does allow API access, does the API allow user-based security permissions where we can restrict access to certain fields?
5. Which export/import formats does the system support for data?
6. Please describe how data feeds from our internal systems, third-party vendors, and benefits carriers will integrate with your product (ex – 360-degree data file feeds).
7. Does your system support mass-update configuration changes?
8. Describe your ability to integrate with 401k providers. Please give examples.
9. Does your system offer the 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?

**Data Access**

1. Is data encrypted at rest?
2. Is data encrypted in transit?
3. Please describe the data storage and hosting environment and level of redundancy for data hosting.
4. Does the system retain/maintain employee records for a specific time? What is that time limit?
5. [Is there a test environment for the customer to use?](https://paylocity.loopio.com/library/view/1004124)

**Security and Stability**

1. Please provide an overview of your security controls.
2. How are your customers notified of any breach and/or vulnerability that is identified? What is the timeframe for the notification to the customer?
3. Define your hardware, and operating system requirements (including 3rd party and/or supporting requirements).
4. Provide a description of your company's disaster recovery options – redundancy and recovery procedures.
5. Which user roles are built into the system?
6. Does the system allow the creation of custom user roles?
7. Does the system have multi-level user defined approval levels?
8. Does the system support multi-factor authentication?
9. How often is data backed up and what type of backup schedule and routine is employed?

**Other**

1. What does your service cost for one year with our current size and how will it change if we have extra employees?
2. Are there any hidden fees that have not been mentioned yet?
3. How long are these rates in effect?
4. What are HRIS implementation costs?
5. Do we have to pay for support after the initial implementation period?
6. Are there limitations to the number of employees the software can support?
7. Does the HR software align with the benefits you want to offer your employees?
8. Will the HR software continue to streamline processes through company growth?
9. What’s on the roadmap? What features or updates can you look forward to?
10. What support does the vendor offer?
11. How does the system compare with Paylocity or Paycor?
12. Does it require integrations with other HR solutions?

**Product Functionality:**

**Payroll**

1. Does the system have an integrated payroll system? Please provide an overview description of your payroll system.
2. Does the system provide for and track taxes in all federal, state, and local tax jurisdictions in the United States and its territories?
3. Does the system monitor all tax requirements or is that our responsibility to let you know?
4. Does the system complete and pay all tax filing?
5. Does system have export capabilities to Accounting software?
6. Does the system have out of the box integration with accounting software?
7. Does the system track historical pay information?
8. Does the system have total compensation statements (real-time)?
9. Does the system have the capability to do mass notifications?
10. Is Payroll regulatory reporting available?
11. Describe how adjustments to exempt salaries are calculated, particularly partial pay.
12. If certain departments have permanent percent allocations to different departments (specifically for grants), can this be handled in your time system and/or payroll?
13. Are automatic direct deposits possible for each payroll
14. Will federal, state, and local tax updates be made for me every quarter? Describe the update process.
15. Describe how adjustments to exempt salaries are calculated, particularly partial pay.
16. Can we run payroll on our own schedule and make last minute changes without added fees? Explain.
17. Does the system have an Employee Personal Expense Reimbursement (PER) feature?
18. Can the system allocate hours/dollars to another cost center through the payroll process?
19. If we use another time system, which file formats/specifications are needed to send that file to payroll?
20. Is your system able to generate and track hours for employees, but not pass these hours to payroll for calculation, to be used for allocation costing?
21. Is your system able to handle fringe allocations for deductions?
22. Are rules for premiums pays – overtime, double time – fully configurable by the user? Please document.
23. Does your system calculate garnishments based on state and federal calculations requirements?
24. Does your system have the capability to assign multiple rates to employees?
25. When working on the payroll entries, is the company Payroll Administrator able to open an employee while in the payroll batch to edit their individual pay data?
26. Can your system accommodate multiple pay rates for the same person working in different roles/positions?
27. Does your system issue Paperless Paychecks & W2s?
28. Does your system track YTD, QTD, MTD and last payroll amounts by earning type, and by employee?
29. Does your system supports an unlimited number of earning definitions? If there are limits, please describe.
30. Is your system able to process termination checks and maintain the original date in the system of the termination check - even if recording the payroll costs and taxes on a later date?
31. Does your system support retro pay calculations within the program?
32. Does timesheet information interface with payroll easily and/or seamlessly?
33. Can your system import an excel file to create a bonus pay run?
34. Does your system calculate retro pay adjustments based on an effective date?
35. Does your system process all garnishments – withholdings from checks and payments to agencies?
36. Does the solution support varying pay cycles?
37. Does your system have the ability to report an employee's earning, tax, and deduction information for any given pay cycle or time period?
38. Does your system have the ability to calculate employee salary overpayment(s) and implement declining balance payroll deductions to recoup (current year - net pay) OR recover (past year - gross pay) such overpayment(s) AND to adjust wages for current year and to note a prior period adjustment for past years?
39. Does your system have the ability to provide a net pay calculator to end users for "what if" deduction scenarios?
40. Does the system have the ability to set up Company holidays that may differ from calendar holidays? Example – The Friday after Thanksgiving is a Corporate Holiday; however, it is not paid at the Holiday Rate.
41. Does the system have a Gross up Calculator?
42. Can we set up an integration with the GL in the financial system or ERP?
43. HSA Deductions - if an employee has not selected a high deductible health plan does your system automatically prevent the employee from having any HSA deduction on their paycheck?
44. HSA Deductions - Are employee HSA deductions direct deposited automatically each time payroll is processed into the employee HSA bank account?
45. Can specific earnings be scheduled for a specific payroll cycle (i.e., once a month)?
46. Does your system support effective dating with deductions?

**Time and Attendance**

1. Please describe your Time and Attendance module.
2. Does the system allow for Paid Time off requests with Manager Approval?
3. Will Managers have access to team members’ PTO Balances to review when they request time off?
4. Does the system allow for Managers to view and approve timesheets daily?
5. Does the system allow for different time keeping options? (i.e., clock-in and out for hourly employees, checking for sales force)?
6. Does the system allow for geo-fencing for attendance?
7. Can the attendance system be integrated with additional data from CRM or other employee performance and activity tracking tools to allow independent confirmation of work activity?
8. Does the system have Paid-Time-Off accrual tracking?
9. Does the system allow for tiered time off accruals?
10. Does system has paid and unpaid time off tracking?
11. Does the system have automatic bumping through seniority accrual levels?
12. Do you provide schedule tracking with points?
13. Is this module accessible via all mobile devices?
14. How many methods of recording time apply? (clocks, web punch, kiosk face punch, mobile, timesheets)
15. How easy is it for Manager/Admin to view exceptions (missed punch, tardy, early punch, etc.)?
16. Do you utilize anything around attendance points?
17. How can we utilize approvals? Weekly, pay period etc.?
18. Does your system utilize scheduling?  If so, how are schedules created? How can EEs view? What if changes are required?
19. Can difference schedules exist for different areas of the company?
20. Does your system allow administrators to prohibit specified dates?
21. Does your system flag potential errors on timesheets and restrict approval of major errors, such as missed punches?
22. Does your system have attendance incident tracking? If so, provide brief overview.
23. Describe the ability for the system to apply separate OT rules to employees who work different jobs or are part of another unique grouping.
24. Does your system allow for flexible reporting & analytics on labor and OT?
25. Does the system enable both the user and HR to enter time?
26. Does your time and attendance module include labor allocation and a fully integrated timekeeping system that eliminates the instance of duplication of information?
27. Does the system have the ability to assign approvers and reviewers by cost code?
28. Does the system allow for viewing employee attendance data for a defined period?
29. Does the system have the ability to revise timesheet (and all timesheet fields) after timesheet period?
30. Does the system have the capability to assign certain hours to different departments and rates?
31. Does the system have the ability to configure the time sheet screen for users, groups of users, or the entire company?
32. Is the system able to display actual punch times while rounding hours and displaying the rounded totals in the total hours section of the time sheet?
33. Does the system allow managers to view/approve requests for edits and time off? Can the system require comments to identify reasons for time sheet changes?
34. Does the system offer multiple punching methods that can be utilized such as time clocks, computer punching, and a smart‐phone application with punch capability?
35. Does the system have automatic notifications to remind employees and supervisors to finish/approve time sheets based on a client configured deadline? If not automatic, is there the ability to press a button to send out to all, without needing to specify in program who those are that need to finish?
36. Can time records be locked from further edits?
37. Does the system support employee sign-off of time cards with notification of "I certify that this timesheet is correct"?
38. Does the system provide configurable grace and tardy rules by employee group?
39. Does the system support an unlimited number of pay codes and pay categories for tracking employee time?
40. Does the system allow managers to easily identify and resolve exceptions in a user friendly manner within program?
41. Can Managers/supervisors view all their employees’ time and attendance records on a single screen for the entire pay period without the need to scroll between days of the week and/or employee?
42. Are there warnings or highlighted areas for Managers to easily see when something is out of the ordinary for an employee's time sheet?
43. Does the system have the ability to allow for meal and break periods?
44. Does the system allow for shift differentials and unique rules?
45. Do you have a mobile app allowing users to track their time & attendance remotely?

**Benefits**

1. How does the system handle benefits administration?
2. Explain how the system facilitates reporting to third party vendors such as benefit providers.
3. Does the system offer and support online benefit open enrollment? (Paperless OE)
4. Does the system offer an interface with benefit carriers? Which ones?
5. Does the system offer employees with a Total Compensation Benefit statement?
6. Does the benefit data automatically populate in payroll? Is it real-time or a batch process?
7. Does your system have a module to maintain Worker’s Compensation Claims, Costs, tracking lost time, restrictions, legal reporting requirements, regular reporting, etc.?
8. Does the system allow employees to choose their benefit plan and coverage options?
9. Does the system filter for plan dependencies (for example, will the system provide HSA options when an HDHP plan is elected but hide those options when an HDHP is not elected)?
10. Can the system calculate benefit eligible wages differently for each plan?
11. Does the system provide functions to define rate, calculation, and deduction rules for each benefit program and plan?
12. In transmitting data to carriers, do you employ fully automated, electronic file feeds? Can these file feeds be customized to carrier specifications? Can you adhere to HIPAA file standards?
13. Can the user/administrator track and view enrollment status online? Describe available on-screen tools, dashboards, reports, etc.
14. Are cost calculations for all employee options (including those subject to a dynamic calculation, such
15. as life insurance and disability) visible to the employee on the enrollment screen?
16. Is there a limit on the number of benefit plans that can be configured in the proposed system?
17. Does the system include defined start and stop dates for benefit/deduction?
18. Does the system define and maintain benefit/deductions for the employee and employer?
19. Does the system have the ability to display eligible benefits based on role?
20. Does the system provide configurable life events to automatically trigger enrollment through system?
21. Does the system allow for configuration of eligibility rules based on employment information and employee personal information?
22. Are employee benefit enrollments effective dated and will the system automatically update employees’ payroll information to begin on that effective date?
23. Does the system support life insurance imputed amount for both viewing by employee and payroll processing?
24. Does the system support unique enrollment dates for each benefit plan?
25. Can the system be configured to automatically terminate employee coverage based on plan rules?
26. If "pended," does the system retain the employee election so that it can be confirmed once EOI is received?
27. In the case of pending documents, can the system hold those benefit transactions until approval while releasing other approved transactions? For example, if an employee elects life insurance at enrollment which is over the Guarantee Issue, can the system “pend” this subject to EOI approval while releasing the medical election?
28. Does the employee have the ability to make changes to benefits throughout the year? For example, HSA and commuter benefits.
29. Can the system run Total Compensation statements – is there an additional cost for this?
30. Can we access a billing suite that pulls monthly enrollments for billing reconciliation?
31. Does the system allow administrators to prohibit specified dates?
32. Does the system flag potential errors on timesheets and restrict approval of major errors, such as missed punches?

**Recruiting / Applicant Tracking**

1. Provide a brief description of your recruiting and applicant management system.
2. Does the system transfer demographic data upon hire to HR module?
3. Is the system able to connect and post through online job boards like Indeed? Are any preconfigured?
4. Does the system integrate (out of the box) with any 3rd party applicant tracking / talent acquisition systems currently on the market?
5. Does the system allow administrators to create, delete, and modify the application templates and application questions?
6. Can administrators create and customize email triggers based on actions (candidate status changes, offer letters, interviews, etc.)?
7. Can the system prevent applicants from applying for the same job twice?
8. Does the system allow administrators to define qualifying (knockout) questions to automatically reject ineligible candidates (e.g., are you legally permitted to work in the United States)?
9. Does the system provide government compliant diversity and EEO questionnaires for candidate tracking?
10. Does the solution track candidate/applicant evaluations, such as permitting interviewers to enter notes, or providing questionnaires about necessary job skills?
11. Can hiring managers upload interview documents?
12. Does the system provide analytics and reporting capabilities for Time to fill, demographic (EEO), candidate source, current open roles/status, breakdown by department, etc.?
13. Does the system generate customized offer letters/packets?
14. Can the system submit or create a general application or profile for future consideration?
15. Does the system pre-screen unqualified candidates?
16. Can the system manage multiple and/or evergreen openings for the same role?
17. Does the system allow for an internal job board to post requisitions separately from the external job board?
18. Can candidates view the job board/career page on a mobile device without compromising utility?
19. Can candidates complete all aspects of the application process on the mobile application?
20. Does the system have the ability to parse resumes and allow candidates to attach resumes?
21. Once hired, describe the process and ease of moving candidate profile data from the external candidate profile to the new employee profile.
22. Does the system have a filtering functionality and ease of search for finding open positions by department, function, location, etc.?
23. Does your system allow for an automatic e-mail response to applicants and candidates? If so, please describe the communication types included in the application. Can we customize the responses?

**Onboarding**

1. Provide an overview of your Onboarding, detailing the user experience from recruiting to hiring to onboarding.
2. Does your system allow for E-verify with a direct link?
3. Does your system offer E-sign submission, print capabilities, and additional uploads as attachments?
4. What is configurable as far as email notifications for required documents (clearances, CPR, Licenses)?
5. Does your system offer onboarding dashboards for HR, MIS, managers, etc.?
6. Can employees independently retrieve forgotten passwords during the onboarding process?
7. Can that workflow also notify when any changes in hiring occur (change in start date, spelling of name, etc.)?
8. Does your system have the ability to provide electronic new hire packets, with ability to attach or link to external URLs?
9. Does your system support E‐Verify integration?
10. Onboard Tracking:We want recruiters and hiring managers to easily see the progress of all onboarding participants and activities and have automatic nudges and reminders when activities are approaching or are past due. Describe how this is accomplished in your solution.
11. Onboard Learning: we would like to push content-rich learning items such as videos, documents, welcome messages, links, etc. to help make the new hire’s day one experience a great one. How does your solution enable us to do this and can the new hire – before day one – access content kept in the learning module so that we can track completion?
12. Onboard Provisioning: In the spirit of paperless HR, how would you recommend and/or what tools are included in the solution to help us create and manage internal forms and communications for such things as getting security badges, ordering computer hardware/software, understanding security expectations, office/desk space set-up, order nameplates, business cards, etc.?
13. Does your system have the ability to automatically notify new hire of activities he/she needs to complete and then send reminder?
14. Does your system include I-9 Verification?
15. Data Security: Does your system have the ability to restrict access to employees and their onboarding documents based on user role?
16. Document Repository: Does your system contains a library of forms used for data collection and retain copies of forms completed by employees during onboarding?
17. Does your system have the ability to assign tasks, collect data, collect signatures, store, and retrieve documents related to the person’s employment?
18. Does your system have the ability to assign onboarding forms by Employee Type?
19. Does your system allow for eSignatures for job descriptions?
20. Describe how the I9 and e-Verify process work in your system.
21. Does your system have the ability for new hires to complete, sign, and send onboarding documents electronically?
22. Does your system have the ability to support a paperless onboarding process with W-4, I-9 documents, electronic signatures, and the generation of the ongoing unique employee identification number?
23. Is employee data available throughout entire application upon approval with no need for duplicate data entry?
24. Can forms can be stored in an electronic repository for easy, anytime access.
25. Can new hires be transitioned seamlessly into HR/Payroll after the offer has been accepted?
26. Does your system have the ability to delegate a proxy or change the owner for any specific task?

**Position Management**

1. Does your system indicate budget period?
2. Does your system allow overstaffing for positions?
3. Does your system support the generation of organization charts based on position “reports to” hierarchy?
4. Does your system store unlimited history of changes recorded to the position record?
5. Does your system track status of position approvals?
6. Does your system maintain jobs across multiple departments, geographical locations, companies, divisions, and other structural distinctions?
7. Does your system track EEO, FLSA, and other compliance-related data?
8. Does your system track job details including name, description, class/stratum, job family, job type, salary band or grade, FT/PT?
9. Does your system retain job history including title changes, reclassification, and inclusion in career paths?
10. Does your system maintain job status (active, inactive)?
11. Does your system track all employee job-specific data (job grades, job families, salary, reports to, etc.)?
12. Does your system create/manage jobs and job details?
13. Will the system enable us to track positions currently including those budgeted now, in the future, and in the past?
14. What information associated with the employee is controlled by the position? What are the system rules for calculating FTE?

**Performance Management**

1. Does your system offer an online performance management system?
2. Does your system allow for continuous journaling? Can the journals be accessed outside the performance review?
3. Are employee journals automatically shared with their Supervisor? Can journals be marked as private and not shared with anyone? Can journals be associated to a Goal? Can Journals be included in a Performance Review?
4. Does the system provide a Talent Dashboard with a summary view of pay and performance for their team?
5. Does system allow for 360/periodic reviews?
6. Does the system have an employee survey function and/or integrated with third party survey software?
7. Does system allow for competency-based employment development plans?
8. Does the system provide the ability to automate the review process?
9. Does the system allow managers and employees to select a rating from a predetermined rating scale?
10. Does the system have the ability to complete performance improvement plans, assign to an employee and track the completion of action items throughout the process?
11. Describe how feedback can be collected at the end of each project and how that feedback is consolidates into the employee’s annual review.
12. Describe how peer to peer feedback can be given and how it can be tracked.
13. Describe how multiple reviewers can be assigned to one employee and what each of the reviewers can see. (Can they see each other’s comments? Can the manager see everyone’s)?
14. Does the system provide printable/pdf capabilities?
15. Does the system have the ability to electronically acknowledge review discussion took place?
16. Does the system enable administrators and managers to view the status of the review process at any time?
17. Does the system enable administrators to assign different review forms for different employees within the same review cycle?
18. Does the system have the ability to attach documents to a performance review (e.g. emails, communications, notes, etc.)?
19. Can the questions be customized for evaluations?
20. Can the rating scales be customized for evaluations?
21. Is there a section to enter employee performance review information, including comments and dates?
22. Does the system enable individual weighting of goals within the review form?
23. Does the system provide a custom competency library?
24. Can we custom design our performance review forms?
25. Can we aggregate performance scores based on weightings and pre-established criteria?
26. Does the system enable us to create, modify, and manage criteria including weights, order, and formatting?
27. Does the system provide for the administration and tracking of performance improvement or remediation plans and associated activities?
28. Does the system have the ability to administer multiple types of performance reviews/appraisals (ranking/grading, 360-reviews, self-review, peer-review) at configurable intervals?
29. Ability to create separate "plans" for different sub sets of employees?
30. Can the system track different levels of performance management (30 day checklist, 90 day review, and annual review)
31. Delivers a configurable “out-of-the box” performance management process (i.e., goal setting, feedback gathering, review, performance summary).
32. Does your system support manager and employee performance feedback throughout the performance cycle?
33. Does your system support the ability for users to assign/align development goals to organizational goals?
34. Does your system support assigning activities to goals and/or objectives?
35. Does your system support varying goal formats: Management by Objective, SMART, and Objective and Key Results?
36. Track percentage completion for specific goals and objectives
37. Ability for managers to cascade goals based on alignment with departmental or organizational goals?
38. Ability for managers and employees to establish date-effective goals and objectives.
39. Ability to include specific goals in Reviews.
40. Track historical performance for an employee, a supervisor's reports, or other hierarchy segmentation. Maintaining performance feedback and rating history.
41. Does your system support journaling about an Employee's performance? Are employee journals automatically shared with their Supervisor? Can journals be marked as private and not shared with anyone? Can Journals be included in a Performance Review?
42. What is the best feature in your Performance management system?
43. Does your system allow for continuous journaling? Can the journals be accessed outside the performance review?
44. Provides a centralized gateway for managers to monitor the progress of their performance management activities — in one place.
45. Please describe any Performance capabilities available via mobile device (i.e. view-only vs update functionality).
46. Can reviews be seen by multiple layers of management and can comments be made by all levels?
47. Summarizes performance review in an easy-to-read format that can be printed for future reference.
48. Does the system generate automatic reminders and automatic assignment of due dates for performance events?
49. Provide for detailed and summary performance reporting.
50. Enables employees to complete self-evaluations.
51. Sign-off and acknowledgement capability for both manager and employee.
52. Does your system enable managers to identify high potential employees during the performance process?
53. Can system conduct Exit Interview and handle robust employee surveys?
54. Does the system provide a Talent Dashboard with a summary view of employee's performance activity and pay for their team?
55. Ability to save work in process/draft reviews and provides option to return to complete.

**Compensation Management**

1. Provide an overview of the key compensation features of your system.
2. Does your system incorporate performance results into your compensation plans?
3. Does your system automatically calculate the merit increases for the Manager if they enter in a dollar amount, it provides the % increase and if they enter in the % it calculates the dollar amount?
4. Does your system allow for a configurable and flexible approval process for compensation plans?
5. Does your system automatically calculate the Managers budget totals, used, and remaining across their team based on compensation rules
6. Does your system provide guidelines to the Manager for merit increases?
7. Do you support Super Approvers and what approval functions can they perform for others?
8. What happens if you have a comp plan setup with the approval of "next level supervisor" but you change supervisors in the middle of a comp plan process? Does the comp stay with the supervisor that was originally setup or will it carry forward to the new supervisor?
9. Does your system support multiple approvers of plan recommendations and return denied plans to originating manager?
10. Does your system automatically calculate the Managers budget totals, used, and remaining across their team based on compensation rules?
11. Does your system have the ability to support roll up of cascading budgets and display team budget summaries (i.e., percent of budget utilized)?
12. Does your system support building salary budgets?
13. Can we set up a compensation cycles on any interval?
14. Does your system support multiple payout periods and off cycle rewards?
15. Does your system support multiple pay practices by business unit, location and job?
16. Does your system create a document to notify employees of new changes to their title, base salary, variable pay, etc.?
17. Does the system provide an on- line view of the employee’s total compensation package including pension, benefits, perks, bonuses and incentives?
18. Does the performance rating scale need to match the configured plan guidelines?
19. Provides the ability to include performance factor as a component of the merit guideline matrix.
20. Do administrators have the ability to setup merit matrices in order to provide guidelines to managers?
21. Can a manager allocate and submit the plan on behalf of managers that report up to them?
22. Provides budget worksheets to assist managers in compensation planning.
23. Does your system automatically calculate the merit increases for the Manager if they enter in a dollar amount, it provides the % increase and if they enter in the % it calculates the dollar amount?
24. Will business leaders be able to view compensation planning worksheets for direct reports and downstream subordinates?
25. The solution facilitates an automated process for increases and enables administration of employee base salaries and hourly pay salary change workflows.
26. Can a mass increase be given to a specified subset of employees?
27. Is compensation fully integrated with the HRIS and payroll functions?
28. Maintain compensation-related history for roles.
29. Explain how your system creates and retains salary history.
30. Do we need to use your Performance Management solution to use the Compensation module?
31. Does your system include the performance rating on the compensation worksheet?
32. Describe the integration with position management and how salary ranges/grades are established in the system, grades are assigned to positions, and positions are assigned to associates.
33. Is there a way to export a report to show everyone who has approved merit increases?
34. What types of Reporting & Analytics are available?
35. Ability to report on compensation across organizational levels, by paybands, job levels, job types, specific positions, locations, and other specifics.
36. How is compensation modeling handled in your system?
37. Does your system have the ability to cap compensation adjustments at maximum or indicate when over maximum?
38. Ability to configure workflows associated with increases below/above established ranges, payband promotions.
39. Explain how your system calculates, displays, and reports compa-ratio and/or quartile information.
40. Configure role-based security for a compensation manager.

**Learning Management**

1. Please describe your Learning Management functionality.
2. Do you have any features to create content or facilitate peer-to-peer learning?
3. Does any content come with your training module? Please explain.
4. Is this an integrated in-house solution or third-party?
5. How are training courses delivered by your product?
6. How training courses should be created to be uploaded to your product?
7. Can external training courses be accessed?
8. Describe any learning administration functionality e.g. licenses, certifications, training completion tracking, course listing, registrations, etc.
9. Is there ability to course write (authoring tool) or include aspects of gamification into training initiative?
10. Does the learning assignments link to Outlook for calendaring of activities?
11. If applicable, does the learning management system have robust communication tools such as announcements, scheduling, and facilitator and learner profiles?
12. Can the system track when certifications, licenses, etc. are about to expire?
13. The system can provide access to training library.
14. The system provides ability to develop and schedule employee training courses.
15. How does your system accommodate offerings to different classes?
16. Tracks multiple language proficiency information including speaking, reading, and writing, for each employee.
17. Ability to manage (scheduling, reporting) compliance training.
18. Ability to search for employees on training, education, experience, certifications and licenses.
19. Reporting capability for administrators - tracking completion and performance for individuals, as well as segmented by organizational levels or other segmentations.
20. Ability to connect to external vendor courses.
21. Ability to create and maintain a catalog of courses.
22. Does your system support updating an employee's talent profile with transcript data?
23. Does your system provide the ability for users to upload and share self-generated content?
24. Does your system provide the ability to link to content on external sources?
25. Does your system provide notification and viewing of certification requirements that are expiring in different incremental periods (e.g., 30, 60, 90 days)?
26. Can the user see the employee's required and recommended learning activities?
27. Can the user access an individual development plan?
28. Can the user view all courses available within the catalog by location, competency requirements, and learning path?
29. Please describe any Learning capabilities available via mobile device (i.e. view-only vs update functionality).
30. What was the original release date of your Learning Management system (i.e., version 1.0)?

**Expense Management**

* + - 1. Describe your system’s capabilities of providing expense management.
      2. Is this developed in-house or provided by third-party?
      3. Ability to log and track employee mileage with approval workflow for reimbursement through accounting/payroll.
      4. System capable of managing employee-entered expenses.
      5. Capable of allowing employees to enter expenses directly. Expenses include but are not limited to: mileage, travel, meals, printing, seminars, office supplies, licenses.
      6. Employee vs. employer expense.
      7. Ability to incorporate an electronic approval path for reimbursement claims.
      8. Route employee expense reimbursements from Accounts Payable to Payroll for a consolidated remittance.
      9. Can we generate spend reports based on reimbursement data?
      10. Can employees capture, submit receipts directly from a mobile device? Can these be routed for approval?

**Analytics and Reporting**

1. Does the system provide dashboards? Please provide examples.
2. Does system have Ad Hoc report writing and modification? Is this third-party or developed in-house? Please describe.
3. Describe any analytics tools available with your system. Are these included in the basic package?
4. Describe how a non-technical user can obtain reports from the system without assistance.
5. What standard reports do you offer with your package?
6. Do you offer point-in-time reporting? Please describe.
7. Provide salary and benefits reporting and total cost analysis. Reports designed by one person can be used by other users.
8. User-friendly interface for accessing & running reports
9. Does the system have the ability to pull reports listing employees on leave, types of leave, etc. for accurate leave tracking? Describe.
10. What is your standard policy or recommendation for the transfer of historical data? Pay data, employee work history data, etc.
11. Provides easy-to-use report catalog; user is not required to understand the database design.
12. Can the system perform calculations within reports such as Turnover and Retention rates for a specific time interval?
13. Presents data in a way that makes it easy for users to navigate within a database and assemble reports.
14. Is your system capable of producing historical reports relating to items including, but not limited to, job title, pay, employee status, etc.? If no, does your system generate reports based solely on current employee data?
15. Reports can be generated on demand.
16. Can a journal entry report be run that can be imported into an accounting system?
17. Benefit tracking: Health insurance, supplemental insurance.
18. Stat report (Name, employee #, project #, title, hire date, pay rate, standard hours, health code, w/c code, pension eligible).
19. Employer Contribution Report.
20. Reports can be assigned an expiration date for automatic purging or archiving.
21. Reports be run while managers are in other parts of the system simultaneously.
22. Provides access to unlimited years of check and schedule history.
23. Provides ability to schedule standard and ad hoc reports.

**Compliance**

1. As human resource regulations change, how do you ensure your clients stay in compliance? What technologies do you offer for Compliance?
2. Do you offer ACA services?
3. What services can you provide as far as processing Year End?
4. Do you provide Tax services? If yes, to what extent?
5. Explain how your system maintains OSHA logs.
6. Describe how the software facilitates the maintenance of employee data and creation of employee history (status changes, promotions, demotions, transfers, etc.?).
7. How do you track FMLA leave?
8. Do you offer Applicant Tracking Systems that meet Affirmative Action requirements?
9. Does the system provide EEO Reporting?
10. Does the system track the work opportunity tax credit?
11. Do we maintain state mandated paid leave policies? (i.e. New York Paid Leave, Maryland Paid Leave, etc.).
12. Can your system accommodate mandated meal and rest breaks?
13. Does your service provide resources for state mandated trainings, such as CA and CT anti-harassment training?
14. Does your service file and collect PA local taxes, including Philadelphia and Pittsburgh?
15. Does the system track employee tips? Can you file form 8846 on behalf of my company?
16. Does your service do new hire reporting on behalf of employers? Do you do termination reporting?
17. Do you provide EITC notices for employees?
18. The system has the ability for provide Compliance Tracking.
19. Provides HIPAA training and compliance reporting related to the training.
20. Vets-4212.
21. Does the system provide reports to file 6055 and 6056 – including forms 1094‐C and 1095‐C? Does information auto‐populate?
22. Does your service do new hire reporting on behalf of employers?
23. Do we maintain state mandated paid leave policies? (i.e. New York Paid Leave, Maryland Paid Leave, etc.).
24. Does the system provide EEO Reporting?
25. Do you offer Applicant Tracking Systems that meet Affirmative Action requirements?
26. Includes affirmative action compliance features.
27. Provides military and veteran status for employees.
28. Tracks ADA and disability information.
29. COBRA letters can be generated from the system.
30. Automatic notification of I-9 expiration/visa expiration.
31. Multi-Worksite Reports.
32. How do you stay current with changes in human resources?

**Employee Self Service**

1. Does the system allow for employee self-service?
   1. Ability for employees to access pay stubs, payroll history, W-2.
   2. Ability for employees to access PTO accruals and other benefit availability / eligibility.
   3. Ability for employees to update: address, phone number, W-4, beneficiary
   4. Ability for new hired employees to complete Onboarding before start date:
      1. I-9
      2. W-4
      3. Address
      4. Direct Deposit Information
      5. Emergency Contact
      6. Electronic document approval
2. Does system have ability for managers to view or change data related to their direct and indirect employees?
3. Ability to search employees by employee number, name, company, location, status, job, pay group, department number, etc.
4. What data can employees download from the self-service portal? Is Administrative Security available to define specific data that cannot be downloaded regardless of the user’s execution rights?
5. Is there functionality to limit access to different fields/sections of system based on defined employee groups?
6. What type of functionality is available through your mobile app?
7. Is there a built-in confirmation / review process so that any self-service change/updates to data can be reviewed/approved by an HR department staff member with appropriate permissions before being committed to the system?
8. How do you support electronic signatures?
9. Does system offer ability for to recognize fellow coworkers for achievements?
10. What alerts/notifications e.g. certification or license expiring, new policy acknowledgements are available?
11. Employee initiated transactions without paper forms; e.g. phone, address change, emergency contacts? Describe the items that employees may directly access and self-manage.
12. Can the employee self-service portal house important employee documents for reference (e.g. Employee Handbooks, policies, etc.)?

**Engagement**

1. [Does your application support employee surveys and employee engagement tools?](https://paylocity.loopio.com/library/view/1383917)
2. [Does system offer ability for to recognize fellow coworkers for achievements?](https://paylocity.loopio.com/library/view/1065672)
3. [Does the solution offer reward & recognition capabilities?](https://paylocity.loopio.com/library/view/1433310)
4. Do you offer a mobile app? If so, how are engagement capabilities utilized on the app for our employees?
5. [Please provide an overview of how your user experience helps drive user adoption, even among non-technical users. What are any unique aspects?](https://paylocity.loopio.com/library/view/808585)
6. [Social Learning: discuss your capabilities to provide a social learning experience including what tools or resources are provided with the solution.](https://paylocity.loopio.com/library/view/1471376)
7. Does your solution provide a Survey tool? Describe the capabilities.
8. Create custom questions with variety of response types (T/F, 1-5 scale, agree/disagree scale, open text, etc.)
9. Ability to run evergreen (always-on) surveys (e.g., New Hire survey).
10. Ability to only send to target population based on department, job title, etc.
11. Prepackaged surveys proven to provide data points that can be used to drive actionable change.
12. Prepackaged surveys for new hires and terminations.
13. Export raw data from active or completed surveys.
14. Predictive analytics / actionable items, especially around attrition.

**Mobile**

1. What is your approach to providing mobile access to your product?
2. Do you offer a mobile app? What is included in the app? Please describe the functionality.
3. Did you develop your mobile app or was it developed by a third-party?
4. Please explain how the application suite is optimized for use on mobile devices (tablets, phones, etc.)? Are there limitations?
5. For mobile access, operating systems are supported and which are best supported (Android, iOS, Windows Mobile, etc.)?
6. Explain how self-service works on a mobile device.
7. Can employees and supervisors make changes for approval using mobile app?
8. How many customers does your company have that are using mobile capability? What is the average size customer using mobile capabilities?
9. Can employees clock in/out through the app and have approvals routed to supervisors?
10. Does the mobile application have geo‐fencing capability (only allowing an employee to clock in within a certain area)?
11. Can employees the access following:
    * 1. Paycheck, history, W2
      2. Schedules
      3. Benefits
      4. Company directories
      5. Handbooks
12. Can employees request time off and review time off balances?
13. Can expense reports be submitted through the app?

**Service:**

**Implementation**

1. What is your process for effectively managing the implementation process?
2. Do you use subcontractors for any part of the implementation?
3. What is your typical estimated time frame for completing initial implementation of the system?
4. What is the billing model for implementation? Is it Time & Materials or Fixed-Fee?
5. What could cause us to have implementation fees in addition to what is on the initial quote?
6. What experience does your implementation team have?
7. Can you describe your business model of using remote and/or on-site implementation experts, and explain why you use this model?
8. Do you offer a service agreement or a contract?
9. Describe the makeup of your typical implementation team.
10. What are your expectations in terms of client resources?
11. How will our account be managed following implementation?
12. What is your approach to data conversion?
13. Describe how you would approach implementation with poor or missing data.
14. How much history can be imported into the system?
15. Is there a migration tool from test to production or are changes manually made in both places?
16. Describe your issues management approach and plan.
17. [Describe your approach to identifying, managing, mitigating, and tracking of project risks. Provide a sample risk mitigation plan.](https://paylocity.loopio.com/library/view/1016992)

**Customer Support**

1. Describe your service model.
2. What is the location of your customer service?
3. What are you hours of operation?
4. Do you have a dedicated rep model or a call center environment?
5. What are your customer service statistics?
6. Beyond your customer service model, what kind of experience do your service teams have?
7. What is your client retention rate?
8. What is the average tenure of account managers?
9. Define the Support Structure (Tiered Approach, Client assigned 1 point of contact, etc.).
10. Do you provide garnishment services?
11. How is progress and/or success measured for the service team?
12. Beyond your customer service model, what kind of experience do your service teams have?
13. Do you provide any user group initiatives?
14. Can you provide evidence of superior customer service?
15. What notification do you provide customers concerning upgrades?
16. Do you use any outsourcing as a part of your customer support model?
17. What specialist support do you provide for technical, payroll and tax questions?
18. Are client support services available via Chat?

**Training**

1. Provide an overview of your approach to training clients.
2. Describe the types of training/courses available.
3. Is here an additional cost for training?
4. What on-going training is available?
5. What client communications do you provide to clients?
6. What training materials are included within the system?
7. Give examples of the types of requests/development/configuration that would result in fees outside of subscription/maintenance costs.

**5. Evaluation Criteria**

a. The following criteria will be used to evaluate each proposal:

i. Cost

ii. Function

iii. Experience

iv. Quality

v. References

vi. Company’s mission/ involvement with DC community/CBE

b. MAPCS will evaluate each proposal. Cost will not be the sole factor when awarding the contract. MAPCS reserves the right to reject any or all proposals.

c. MAPCS reserves the right to negotiate further with the successful bidder. The content of the RFP and the successful contractor’s proposal will become integral parts of the contract but may be modified by the provisions of the contract.

d. As MAPCS is committed to serving the DC community, consideration will be given to businesses based in Washington DC that employ district residents.

1. **Contractor Expectations**

a. All inquiries regarding technical specifications and questions can be emailed to Enje Brown at [ebrown@seeforever.org](mailto:ebrown@seeforever.org).

b. Allowances will not be after the contractor's proposal is received due to oversight, omission, error, or mistake of the contractor.

**7. Eligibility**

a. To be eligible for award, the contractor shall:

i. Be licensed to do business in the District of Columbia. The amount of the bid shall not exceed the license limit;

ii. Have sufficient liability insurance;

iii. Describe general relevant experiences with projects similar to the one described in this RFP;

iv. Include three references.

**7.** **Bid Details/Required Submittal**

1. The bid must include:
   1. Fixed monthly rate;
   2. Detailed explanation of what the monthly fee includes;
   3. Detailed list of exclusions of services;
   4. Rates that will be charged for additional services;
   5. Whether your company is a small business, based in DC, a minority-owned business, or a Certified Business Enterprise;
   6. Plan to ensure service is provided in a high-quality and consistent manner;
   7. Three references;
   8. Proof of liability insurance.
2. Proposal must be signed by an officer of the contractor who is legally authorized agent to enter into a contract.
3. MAPCS reserves the right to consider proposals with minor variances with respect any specific requirements specified herein but judged to meet the intent of this specification. Such waivers shall not modify any remaining RFP requirements or release contractor from full compliance with the RFP specifications if awarded the contract.

**8.** **Bid Proposal Acceptance and Information**

a. All bid proposals will be accepted until **12:00 PM on May 31, 2022**.

b. Interested contractors will respond to the advertised Notice of RFP via upload to https://app.smartsheet.com/b/form/369916b465ab4b658f381a5a7d7f3ca4.

c. Complete RFP details can be found at [www.seeforever.org/requestforproposals](http://www.seeforever.org/requestforproposals).

d. Any proposal received after **12:01 PM on May 31, 2022** is deemed non- responsive and will not be considered. Proposals will not be accepted by oral communications, telephone, electronic mail, telegraphic transmission, or fax.

e. All costs attributable to the preparation of a proposal or any presentation required to supplement or clarify the proposal are borne by the contractor.

f. MAPCS will rank the proposals in terms of meeting the requirements of this RFP. Additional information may be sought from contractor during the evaluation period.

g. All proposals will remain valid for a minimal period of 45 days subsequent to the RFP closing date.

h. All information submitted in response to this RFP will become the property of MAPCS and may be open to inspection by members of the public.

**9.** **Award**

a. The successful contractor shall enter into a contract for the performance of the work proposed and the contract shall incorporate all applicable provisions of this RFP.

b. MAPCS reserves the right, in its sole discretion, to award the contract to another contractor if contract negotiations do not appear successful.

**10.** **Payment Arrangements**

a. Unless the contract stipulates otherwise, payment will be made as follows:

i. Time and materials work orders will be invoiced by Contractor. MAPCS will make payment within thirty (30) days of receiving the invoice.

ii. If MAPCS makes the payment within fourteen (14) days from receipt of the invoice, a three percent (3%) credit of the invoiced amount will be credited to the next invoice. There is no credit or penalty if this payment is not received in this window.

**14. Bid**

a. In accordance with the provisions of the proposal, the undersigned hereby proposes to furnish all labor and materials for financial, accounting and compliance services. In addition, the undersigned hereby proposes to provide financial, accounting, and compliance services at Maya Angelou Public Charter School located at 5600 East Capitol Street NE, Washington DC 20019.

SIGNED: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TITLE: FULL NAME: (Please Print) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

COMPANY NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

COMPANY ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

b. Please attach your detailed bid. It must include proof of licensing, liability insurance, workman compensation for contractor’s employees, warranties, etc.