SEE FOREVER FOUNDATION
MAYA ANGELOU SCHOOLS

REQUEST FOR PROPOSAL (RFP)

FOR

HUMAN RESOURCES INFORMATION SYSTEM (HRIS)

MAYA ANGELOU SCHOOLS

NO LATER THAN 3:00 PM, June 13, 2025

[PROPOSALS MUST BE UPLOADED HERE](#)

MAYA ANGELOU PUBLIC CHARTER SCHOOL
REQUEST FOR PROPOSALS

1. The Maya Angelou Schools, operated by the See Forever Foundation, serve opportunity youth in Washington, DC, offering education and support to students who have faced challenges in traditional settings. Founded in 1997, the network includes a high school, a young adult learning center, and academies in juvenile and adult correctional facilities.

   The Maya Angelou Public Charter High School (Evans Campus) offers a personalized curriculum for grades 9–12, focusing on college, career readiness, and wraparound supports. The Young Adult Learning Center provides GED prep and job training for students ages 17 and older.

   The network also includes the Maya Angelou Academies at New Beginnings, the Youth Services Center, and the DC Jail, which deliver education and life skills to incarcerated and court-involved youth and adults.

2. 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

1. This RFP issued Maya Angelou Public Charter School (MAPCS) to solicit from proposals from qualified firms to implement a Human Resource Information System (HRIS) to replace the current Paylocity system. The new solution should streamline HR operations across the organization, enhance employee and administrative user experiences, support compliance, and provide deep reporting capabilities to inform strategic decision-making.

2. This RFP describes the general framework and should be considered a minimum standard of service.

3. The term "MAPCS" means Maya Angelou Public Charter School.

4. The term "contractor," "consultant," or "bidder" means the responsible bidder.

5. The term "successful contractor" or "successful bidder" refers to the bidder awarded the contract.

6. The term Quality Assurance (QA)" means a robust program to ensure accountability for executing the contract as per the details of this RFP, executed contract, and appendices.

7. MAPCS contemplates awarding an RFP based on Federal and District procurement requirements and the D.C. Public Charter School Board regulations and guidelines, as applicable.

Project Overview
Maya Angelou Schools seeks to select and implement a Human Resource Information System (HRIS) to replace the current Paylocity system. The new solution should streamline HR operations across the organization, enhance employee and administrative user experiences, support compliance, and provide deep reporting capabilities to inform strategic decision-making.

Objectives
- Implement an all-in-one HRIS platform tailored for educational institutions and scalable with the school's projected growth
- Improve data accuracy, compliance, and employee self-service capabilities
- Reduce administrative burden through automation and streamlined workflows
- Deliver a system that integrates with existing financial systems and benefit providers

Services
1. **Required HRIS Modules**
   Vendor must provide a comprehensive, cloud-based system that includes:

   A. **Core HR and Payroll**
   - Employee self-service and profiles
   - Direct deposit, wage garnishments, tax filing
   - General ledger integration
   - Off-cycle payroll, retroactive pay, and multi-FEIN support

   B. **Time & Attendance**
   - Real-time labor tracking by cost center or project
   - Scheduling, PTO, and leave management (including FMLA)
   - Mobile access and geo-fencing capabilities

   C. **Talent Management**
   - Onboarding with task automation
   - Applicant tracking with job board syndication
   - Performance and compensation management

   D. **Benefits Administration**
   - HSA, FSA, COBRA, and 403(b) integration
   - Carrier feeds and ACA compliance reporting
   - Open enrollment tools with QLE workflows

   E. **Employee Experience**
   - Mobile app with push notifications
   - Surveys, recognition tools, and policy distribution
   - Customizable portal with branding and resources

   F. **Reporting & Analytics**
   - Point-in-time reporting and historical data access
   - Ad hoc and custom report builders
   - Compliance dashboards (EEO, ACA, OSHA, etc.

2. **Implementation Services**
   - Project management and implementation planning
   - Data migration from Paylocity and related systems
   - Configuration of modules and integrations
   - User testing and parallel payroll runs
   - Admin and end-user training

3. **Integration Requirements**
   - Microsoft Dynamics integration for accounting
   - Benefit providers: CareFirst, Metlife, and Mutal of America
   - Background check service integration
   - Single sign-on (SSO), SOC II and ISO compliance

4. **Post-Go-Live Services**
   - Named customer success manager
   - SLA-based support structure
   - Scheduled reviews and optimization support
   - Access to product documentation and ongoing training

EVALUATION CRITERIA

Vendor proposals will be evaluated based on the following weighted criteria:

Tier	Criteria	Weight
HRIS Buying Priorities/Evaluation Criteria		
1	Modern User Interface	12.5%
1	Core HR Capabilities	12.5%
1	Reporting Capabilities	12.5%
1	Customer Support, Implementation & Tax Services	12.5%
User Interface, Core HR, Reporting, Support		50%
2	Size Match & Scalability	10%
2	Product Architecture	10%
2	Integrations with 3rd Party Systems	10%
Scalability, Architecture, Integration		30%
3	Talent Management Capabilities	5%
3	Talent Acquisition Capabilities	5%
3	Total Cost of Ownership	5%
3	Vendor Experience	5%
Talent Tools, Cost, Vendor Experience		20%

1. As general guidelines, the vendor will:
   - Ensure that contracted staff receive all local, state, and federally mandated training, especially related to Occupational Safety and Health Administration (OSHA) requirements;

   - Be solely responsible for the salaries, payroll, taxes, benefits, fees, insurance, and other charges of contracted personnel as required by any federal, state, or local law or regulation (e.g., unemployment taxes, Social Security contributions, worker's compensation premiums, etc.);

   - Provide a 24-hour, 7-day-a week, point of contact for communication of urgent services and issues (e.g., building status due to inclement weather) as identified by MAPCS' primary point of contact;

   - Implement and maintain robust quality assurance (QA) and communication program;

   - Verify that all contracted personnel are familiar with and comply with MAPCS' rules regarding the appropriate behavior of persons established to create a safe environment. As reasonably requested by the successful bidder, MAPCS will assist the contractor with compliance with any applicable policies;

   - Work proactively with MAPCS to devise an acceptable resolution if the conduct of a contracted employee violates MAPCS' policies and expectations. Resolution may include removal of the employee temporarily or permanently;

   - Immediately remove and not allow any contracted employee to work as part of this contract upon receiving written notification from MAPCS to remove a contracted employee by name due to deficiencies in performance or professionalism. (Note that email is considered a written notification.);

   - Adhere to the DC School Safety Omnibus Amendment Act of 2018 (https://osse.dc.gov/page/school-safety-omnibus-amendment-act-2018-ssoaa) and vet all contracted personnel compliance dispatching to MAPCS;

   - Provide a written quote before executing work beyond the scope of this contract (special project) at a predetermined hourly rate plus materials. Quotes for special projects will be inclusive of all materials and labor

   - Ensure that all contracted staff that are dispatched meet the following criteria:
     - Are compliant with the Omnibus Act of 2018
     - Possess sufficient oral and written English language skills to execute duties
     - Remain free of alcohol and other drugs while on MAPCS' premises
     - Not subcontract any services unless MAPCS provides written pre-approval;
     - Ensure the safety of all individuals at MAPCS while performing services;
     - Be knowledgeable and abide by all provisions of local, state, and federal codes, statutes, and ordinances about safety and building code compliance;
   - Report all health and safety issues within 24 hours to MAPCS's primary point of contact

Proposers must provide their proposal in the following format:

Section 1	Transmittal Letter
	A letter of transmittal shall accompany each proposal. Such letter must be signed by a person authorized to contractually obligate the vendor to the scope, terms, specifications, and pricing contained in the response. This letter should also clearly indicate the name, address, phone number and facsimile number of one contact person for the proposal. The letter of transmittal shall include the following: *Certification that the proposer meets all the minimum service qualifications.* *A brief statement of the services to be provided.* *A statement of commitment to provide the services requested within the times and manner specified.* *A summary of the vendor's qualifications to perform this type of engagement.* *A statement confirming that this proposal shall remain valid for six (6) months after the closing date for receipt of proposals.* *Certification that the individual signing this proposal has the authority to bind the proposer to the terms and conditions set out in the proposal document.* *Name of Company* _____ *Signature* _____ *Position* _____ *Date* _____
Section 2	Table of Contents
	The table of contents must include clear and complete identification of the materials submitted by section and page number.
Section 3	References
	Proposer must provide at least three (3) references with which similar services have been performed. Provide a list detailing the references name, title, contact information, services performed, number of customers served, and the length of time the Proposer has provided this service. References provided must be for services that have occurred within the last three (3) years.

Section 4	Required Documents

	1. Proof of Compliance with DC School Safety Omnibus Act of 2018
	    • *Background Checks: Contractor will provide, at their cost, a criminal background check (using fingerprints) for each employee who works in the facilities. Documentation of results must be verified by the institution prior to an employee being assigned to a facility. Background checks must be completed every (2) years for each employee. For any DC Charter school, vendors must adhere to the DC School Safety Omnibus Act of 2018 and vet all contracted personnel and ensure they are in compliance prior to dispatching to MAPCS.*
	
	2. Insurance
	    • *Provide a statement that the firm, if awarded the contract, shall meet all the following insurance requirements:*
	    a. *All bidders must provide evidence of insurance or insurability. The contractor shall maintain, at its own expense, throughout the life of this Agreement, the following insurance with insurers reasonably acceptable to MAPCS. The successful bidder must provide written notice to MAPCS at least thirty (30) days before the cancellation, non-renewal, or material modification of any policies as evidenced by return receipt of United States certified mail.*
	    b. *Workers' Compensation Insurance in the more significant sum of (1) the insurance currently maintained by the Contractor, (2) any amounts and scope required by statute or other governing law, or (3) the following:*
	      (i) *bodily injury by accident -$100,000 for each accident;*
	      (ii) *bodily injury by disease - $500,000 policy limit; or bodily injury by disease - $100,000 for each employee.*
	    c. *Commercial General Liability Insurance on an occurrence basis in an amount equal to the greater of (1) the insurance currently maintained by the Contractor or (2) $2,000,000 for each occurrence; and such insurance shall include the following coverage;*
	      (i) *completed operations coverage*
	      (ii) *contractual liability coverage*
	      (iii) *personal injury coverage,*
	      (iv) *an endorsement naming MAPCS as an additional insured, and*
	      (v) *an endorsement providing that such insurance as is afforded under Contractor's policy is primary insurance in respect to the additional insureds. NOTE: The additional insured endorsement required herein shall be an ISO Form B (CG 2010 85) or equivalent.*
	    d. *Professional insurance (Errors and Omissions) in the same amount as the Commercial General Liability Insurance stated in (B)*
	    e. *No endorsement limiting or excluding mandatory coverage is permitted. In addition to securing the above insurance policies, the Contractor shall also require all of its subcontractors to maintain the same types of insurance required of the Contractor under this Contract, and, in connection with the subcontractors' commercial general liability insurance policies, the Contractor shall also require*

its subcontractors to provide endorsements (i) naming MAPCS as an additional insured, and (ii) providing that such insurance as is afforded under the subcontractor's policy is primary insurance as it pertains to the additional insured.

3. **Certifications/Licenses**
   - *Current insurance shall be due upon award and prior to services rendered.*
   - *Provide a copy of the most recent Basic Business License.*

4. **W-9 Form**
   - *Successful respondents are required to complete and submit a W-9 Form. The W-9 form can be accessed at: http://www.irs.gov/pub/irs-pdf/fw9.pdf?portlet=3. It is the successful respondent's responsibility to act upon this instruction for submitting a W-9 form. MAPCS will not be able to process payments if this form is not completed and submitted to the Finance Department at finance@seeforever.org.*

5. **Completed Vendor Questionnaire**

DOCUMENT INTERPRETATION

In the event of any conflict of interpretation of any part of this comprehensive document, the interpretation shall be governed by the laws of the District of Columbia.

EXCEPTIONS, ALTERNATIONS, ADDITIONS, OR MODIFICATIONS

Suppose the bidder submits any exceptions, additions, or modifications to any portion of this RFP. In that case, the bidder must indicate the exceptions, additions, and changes and include a full explanation as a separate attachment to the proposal. The failure to identify exceptions, alterations, or modifications will constitute acceptance by the bidder of the RFP as proposed by MAPCS. MAPCS reserves the right to reject a proposal containing exceptions, additions, or alterations.

PROPOSAL PREPARATION COSTS AND DOCUMENT RETENTION

1. The bidder shall pay all costs related to the preparation and submission of this proposal. However, the issuance of this RFP does not commit MAPCS, in any way, to pay any costs in the preparation and submission of the proposal, nor does the issuance of the RFP obligate MAPCS to award a contract or purchase any goods and services stated in the RFP.
2. All proposed materials and supporting documentation submitted in response to this proposal become the permanent property of MAPCS.

RESERVATION OF RIGHTS

MAPCS reserves the right, at its sole and absolute discretion (for this provision and all other provisions contained in this RFP), to:
- Accept or reject, in whole or in part, any or all proposals with or without cause;
- Waive any irregularity or informality in the RFP process or any proposal;
- Make corrections or amendments due to errors identified in proposals by MAPCS or the bidder;
- Modify and amend the final contract in negotiation with the contractor;
- Select one or more bidders to perform the services;
- Only renewals can be made via a written agreement between MAPCS and the vendor.

PROJECT TIMELINE

Milestone	Date Range
Release of RFP	May 23, 2025
RFP Responses Due	June 13, 2025
Proposals Reviews, Vendor Discovery & Demos	May 27 – June 13, 2025
Vendor Selection & Award	June 16, 2025
Implementation Start	July 1, 2025
Go-Live	September 2025

DUE DILIGENCE

MAPCS shall have the right to inspect any facility or project site where the services performed under the resultant contract are carried out. MAPCS may monitor the performance of the selected service provider on a pre-agreed-upon frequency of its choosing to ensure compliance with all the requirements of the contract

WARRANTIES AND ASSOCIATIONS

1. Bidder(s) shall furnish all data pertinent to warranties or guarantees that may apply to items in the proposal. Bidder(s) may not limit or exclude any implied warranties.

2. Bidder(s) may not use the MAPCS official logo(s), or any phrase associated with MAPCS, without written permission from MAPCS.

CONFLICT OF INTEREST

The prospective bidder, its agents, employees, directors, and assigns shall disclose any financial, business, or other relationship with MAPCS that may impact the outcome of this contract or the potential future of the MAPCS projects resulting from this effort. In addition, the prospective bidder, its agents, employees, directors, or assigns shall also list current clients who may have a financial interest in the outcome of this contract or the following MAPCS projects. In particular, the prospective bidder, its agents, employees, directors, and assigns shall disclose any financial interest or relationship with any company that might submit a bid on the MAPCS projects.

HOLD HARMLESS AGREEMENT

1. The successful bidder(s), its agents, employees (paid or volunteer), directors, and assigns shall indemnify, hold harmless, and defend MAPCS, its directors, officers, and employees (paid or volunteer) from and against any claims, demands, causes of action of whatever kind or nature arising out of error, omission, misrepresentation, negligent act, conduct or misconduct of the bidder and its agents, employees (paid or volunteer), directors and assigns in the indemnification shall also include reasonable attorneys' fees, court costs, and expenses.

2. The vendor will comply with all applicable federal, state, and local laws, rules, ordinances, policies, regulations, licensing, and permitting requirements and will indemnify, defend, and hold MAPCS harmless from any liability for failure to comply.

Questions regarding this Request for Proposals shall be submitted no later than **3:00 PM EST, June 13, 2025**

Dr. Nakita McNeil-West
Procurement, Contracts, Grants
See Forever Foundation/ Maya Angelou Public Charter School
nwest@seeforever.org
p: (202) 797-8250 ext 1012

PROPOSAL SUBMISSION FORMAT REQUIREMENTS
The submitted proposal must address all categories and performance expectations within this RFP.

EVALUATION AND AWARD
1. This RFP in no manner obligates MAPCS to the eventual rental, lease, and purchase of any equipment or service described, implied, or which may be proposed until confirmed by a written contract. Progress toward this end is solely at the discretion of MAPCS and may be terminated at any time before the signing of the agreement. MAPCS may initiate discussions with supplier personnel authorized to obligate the supplier contractually. Discussions will develop into negotiating sessions with the successful bidder(s).

2. If MAPCS cannot agree to contract terms, MAPCS reserves the right to terminate contract negotiations with a bidder and initiate negotiations with another bidder. MAPCS reserves the right to select services and products from any number of bidders if, in its sole discretion, it is in the best interest of MAPCS to do so. Evaluation will consider the proposal(s) best meeting the needs and requirements of MAPCS, and such assessment and determination of best value shall be solely at the discretion of MAPCS.

3. The evaluation of the proposals will be based on the following criteria. The ability to meet the requirements for services is the prime consideration factor.
   a. Cost
   b. Compliance with the product specifications
   c. Experience
   d. Quality
   e. References
   f. Company's mission/ involvement with the DC community/CBE

4. MAPCS reserves the right to award the contract to one or more bidders at its sole discretion.

5. Non-performance by bidder/contractor

6. Before and during the contract term, performance will be a significant consideration of current contract awards, renewals, and future award considerations. Failure to perform in any sense relative to this contract may result in the probation and termination of this agreement by MAPCS based on non-performance.

7. Nonperformance shall be determined as follows:
   - Failure to meet and maintain all qualifications required in this RFP;
   - Failure to keep and maintain all the necessary insurance coverage;
   - Failure to meet required operating performance standards in the period necessary and consistent with a satisfactory and professional manner. Workmanlike manner means work that is "completed skillfully and is non-defective";
   - Failure to rectify deficiencies within thirty (30) days of written notification of such deficiency or such shorter period as outlined in the Contract Documents.

NON-DISCRIMINATION

The selected bidder(s) shall comply and shall require its agents, employees, directors, or assigns to comply with all applicable federal, state, and local laws, ordinances, rules, and regulations regarding nondiscrimination in employment because of race, creed, color, ancestry, national origin, religion, sex, marital status, age, medical condition, pregnancy, disability, or any other prohibited basis.

TRANSITION

If an executed contract with the bidder terminates for any reason, MAPCS reserves the right to have a transition period to a new provider. During this transition period, MAPCS will pay the provider for these goods and services at the negotiated rate(s). MAPCS further reserves the right to establish the length of the transition period and communicate this transition period to the provider; however, such transition period shall not exceed 120 days.

CONTRACT TERMINATION

MAPCS reserves the right to terminate this contract at any time within 30 days of written notification to the Offeror.

INSURANCE

The successful offeror must submit a current Certificate of Insurance (including endorsements and waiver).

CERTIFICATION

Offerors must possess the necessary certifications and shall furnish their certificates with their proposal.
LICENSING

Proposers must provide a valid Basic Business License before any award is given.

CONTRACTUAL CONTACT

Contractual questions must be addressed to Dr. Nakita McNeil-West at nwest@seeforever.org
Allowances will not be given after the contractor's proposal is received due to oversight, omission, error, or mistake on the part of the contractor.

W-9 FORM

Each proposer shall submit a completed W-9 form with their bid. In the event of a contract award, this information is required to issue purchase orders and payments to your firm. A copy of this form can be downloaded from http://www.irs.gov/pub/irspdf/fw9.pdf.

BID PROPOSAL INFORMATION

All bid proposals will be accepted until **3:00 PM, June 13, 2025.** Interested vendors will respond to the advertised Notice of RFP.

Complete RFP details can be found at https://www.seeforever.org/rfp/

1. Any proposal received after **3:01 PM on June 13, 2025,** is deemed non-responsive and will not be considered. Oral communications, telephone, electronic mail, telegraphic transmission, or fax will not accept proposals.

2. The contractor bears all costs attributable to preparing a proposal or any presentation required to supplement or clarify it.

3. MAPCS will rank the proposals according to their ability to meet the requirements of this RFP. During the evaluation period, the contractor may be asked for additional information.

4. All proposals will remain valid for at least 45 days after the RFP closing date.

AWARD

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

Per the proposal's provisions, the undersigned hereby proposes to perform the Elevator Modernization Project at the Maya Angelou Campus, located at 5600 East Capitol St. NE, Washington, DC 20019.

Your signature attests:
   a. ***That you are authorized to sign on behalf of your organization;***

   b. ***Your proposal to provide the goods and services is by the published provisions of this Request for Proposal unless modifications or alterations are noted in your proposal submission;***

   c. ***This submission of response shall be prima facie evidence that your organization has complete knowledge of the scope, nature, quantity, and quality of work to be performed, the detailed requirements of the project, and the conditions under which the work is to be performed;***

   d. ***Your organization is not listed on the US Excluded Parties List (https://sam.gov/SAM/);***

   e. ***Your company will comply with the Omnibus Act of 2018;***

   f. ***Your proposal has not violated the antitrust laws of this state, the Business & Commerce Code, or the federal antitrust laws, and has not communicated directly or indirectly the proposal made to any competitor or any other person engaged in such line of business. All proposals may be rejected if MAPCS believes collusion exists among the proposers. In addition, proposals in which the prices could be more balanced may be dismissed.***

   SIGNED: _____

   TITLE: _____

   FULL NAME: (Please Print) _____

   COMPANY NAME: _____

   COMPANY ADDRESS: _____

   PHONE NUMBER: _____

ATTACHMENT A
REFERENCE FORM

Submit at least three references for your organization's rendering of a similar type of service within the past three years.

REFERENCE #1	
Organization Name	
Contact Person's Name	
Contact's Telephone Number	
Contact's E-mail	
Brief Description of the type of services provided	

REFERENCE #2	
Organization Name	
Contact Person's Name	
Contact's Telephone Number	
Contact's E-mail	
Brief Description of the type of services provided	

REFERENCE #3	
Organization Name	
Contact Person's Name	
Contact's Telephone Number	
Contact's E-mail	
Brief Description of the type of services provided	

RETURN THIS FORM WITH THE PROPOSAL

HUMAN RESOURCES INFORMATION SYSTEM (HRIS)

VENDOR QUESTIONNAIRE

Who We Are – Company Overview

The Maya Angelou Schools, operated by the See Forever Foundation, serve opportunity youth in Washington, DC. Our network includes a high school, a young adult learning center, and education programs in juvenile and adult correctional facilities. We are committed to equity, restorative practices, and the legacy of Dr. Maya Angelou.

- **Current Staff:** ~240
- **Projected in 2–3 Years:** ~260
- **Salaried Employees:** 97%
- **Full-Time Employees:** 97%

Who We Are – Project Team

Name	Title	Email
Aaron Cannon	Chief Administrative Officer	acannon@seeforever.org
Amanda Gaebelein	Director of Human Resources	agaebelein@seeforever.org
Jason White	Benefits Technology Consultant	Jason.white@bennie.com
Gia Felder	Senior Client Experience Manager	gia@bennie.com
Logan Kostroun	Director of Advisory Services	logan@outsail.com

What We're Currently Using – Present Systems

Current HCM provider	Paylocity	
Current modules	• 401k Transfer File • Benefits Administration • COBRA Administration • Community Wall • Compensation Management • Compliance Management • Data Insights • Direct Deposit • Employee Action Forms • Employee Self-Service • Expense Management • General Ledger Services • HAS, FSA, and TMA Processing • Human Resource Management • Learning Management	• Mobile App • New Hire Reporting • Onboarding • Payroll Processing • Peer Recognition • Performance Management • Prorated & Retro Pay • Recruiting • Signed & Sealed Checks • Surveys • Tax Filing Services • Time & Attendance • Time Off Management • Unlimited Product Training • Video
Other Related Tech:	• On Demand Pay • Integrated Background check services	

Why We're Looking – Pain Points

Challenges with our current system include difficulty interacting with the interface for administrators, unsatisfactory customer service, lack of diversity in pulling point-in-time reports, inability to find reports suited for our needs, and unreliability with the PTO tracking system.

What We're Looking For – Overview

We will evaluate vendors based on user experience, core HR functionality, data security, and integration capabilities. Priority will be given to systems that are easy to use, compliant with regulations, scalable, and able to integrate with existing tools. Strong reporting, customer support, and overall value for cost will also be key factors in the final selection.

Must Have Modules	
Payroll	- Direct Deposit - General Ledger Service - Expense Management - New Hire Reporting - Payroll Processing - Prorated & Reto Pay - Signed & Sealed Checks - Tax Filing Services
Human Resources	- Compliance Management - Employee Self-Service - HR Management - Time Off Management
Talent Management	- Onboarding - Performance Management - Recruiting
Time & Labor, Benefits, Flexible Benefits	- HSA - COBRA - FSA Management
Employee Experience	• Mobile App
Customer Service	- Dedicated Representatives - Product Training
HR Reporting & Insights	• Data
Integrated Background Check Services	

Open-to-Considering Modules
Surveys   **Community Wall**   **Expense Management**   **IT Management**   **On-Demand Pay**

Vendor Overview

Please provide responses to the following information regarding your company:

- Company overview, including:
  - Company history
  - HQ and office locations
  - Workforce size
  - # of clients
  - % of clients in our industry
  - Logos of similar orgs
  - Annual Revenue
  - R & D spend

Our High-Level Needs

Please provide responses to the following questions and information requests. Please keep your responses brief:

Tier 1 Questions

1. **Modern User Interface**. We are looking for a solution that can help us more efficiently gather employee data and shift some of the administrative burden towards the individual, while delivering a next generation employee experience. Can you tell us more about your capabilities in this area:
   a. What are the most impactful ways that your company is driving employee self-service, especially for non-desktop workers?

   b. How is all relevant employee data captured during your onboarding experience?

   c. Does your system have localization capabilities to automatically know what data needs to be captured in each state and locality?

   d. Is there a way to measure employee utilization so we can see who is / isn't completing self-service tasks?

   e. Can we adjust the employee view of the platform to match our company's brand, colors and messaging?

   f. Can our internal policies and documents be linked and made available during employee workflows (i.e., when requesting time-off ,updating life events, open enrollment)?

   g. Is there an ability to push new policies out to employees and require acknowledgement and e-signatures?

   h. Can we schedule push notifications and emails to hourly employees to remind them to complete their timesheets?

   i. Can we schedule push notification to benefit eligible employees to remind them to complete their benefit enrollments (during the new hire benefits workflow, change in status from Part Time to Full Time and Open Enrollment)

2. **Core HR Capabilities**. We support a highly diverse employee population and need a system that can accurately automate our payroll-time-tax-benefits interactions. Please describe:

   a. Are your time, payroll and benefits systems all developed internally and natively integrated, or have those systems been acquired or white labeled from 3rd parties?

   b. How does your system support the onboarding, offboarding, payments and compliance for part-time employees, interns and other non-full-time populations?

      i. Does your system support bulk hiring, onboarding, re-hiring, pay rate changes, and termination actions?

   c. How does your company stay up-to-date on local tax and compliance regulations for the states that we operate in?

      i. How will legislative changes be communicated to our team and updated in the system?

      ii. What is the workload expectation from our end when it comes to getting set-up in new states and making system updates?

      iii. Given California's heavily regulated environment, how will you help our team avoid compliance missteps in this specific locality?

      iv. Describe how your system complies with California overtime, pay statement, sick leave, and meal & rest period requirements.

   d. What ways does your system ensure that data is accurate and compliant before processing payroll?

      i. Are there validations that ensure proper payroll processing (no termed employees, benefits match paystubs, address changes are included, etc.)?

      ii. Does payroll processing happen in batches, or is payroll constantly processed throughout the pay period?

   e. What innovative features / processes does your system offer to improve either the speed of payroll processing or the accuracy?

   f. Do you offer any managed services that could augment our admin team, such as support for compliance management, state registration, payroll or benefits enrollment?

   g. Do you offer an HR helpdesk that employees can reach out to with questions about their payroll & benefits?

    h.   Can the system generate Total Compensation Statements?

    i.   How does the system collect/report data for EEO reporting?

3. **Product Architecture.** We are looking for a partner that can consolidate many of our HR needs into a single platform while reducing our manual re-entry efforts. Please describe your company's ability to serve as an all-in-one solution. Specifically highlight:
   a. Does your company provide all of the modules listed in our Must-Have and Open-to-Considering table?

   b. Are each of those modules developed by your own company's engineering team, or are some of those modules provided by 3rd party partners? Please specify which modules are provided by 3rd parties and who the 3rd party is

   c. Are there any service providers (tax filing, COBRA admin, HSA/FSA, etc) that are white labeled by your organization as part of the package you offer?

   d. If an employee makes a change in one part of your system, where else do we need to re-enter that change across the other modules?

   e. Does data ever need to be re-populated in different modules? Is data ever not available in real-time across all modules?

4. **Integrations.** We need to understand how your system will interact with our other HR and Finance related technologies. Tell us about your system's integration capabilities. Specifically highlight:

    a. How will your system integrate with an accounting system (Quickbooks)?

        i. Do you have pre-built integrations with this vendor?

    b. In general, when custom integrations are built with HR point solutions, are they done by file transfer, API, webhook or another method?

        i. Who is responsible for building and maintaining new integration? When does the buildout happen?

        ii. What fields are transferred over?

        iii. Are those data transfers scheduled, manual or instantaneous?

        iv. Does data transfer bi-directionally or in one direction?

    c. How will your system integrate with our benefit carriers and 403(b) provider (Carefirst, Metlife, and Mutual of America)?

        i. Are the integrations done by file transfer, API or another method?

        ii. Who is responsible for building and maintaining the integration?

        iii. What fields are transferred over?

        iv. Are those data transfers scheduled, manual or instantaneous?

        v. Does data transfer bi-directionally or in one direction?

5. **Size Match & Scalability**. We are looking for a system that strikes the right balance between being manageable and accessible for a lean HR team, while also being robust enough to meet our future needs. Please describe what makes your system uniquely viable here. Specifically highlight:

    a. What is your average customer size?

        i. How do you segment your customers and what market segment do we fall into?

        ii. What percentage of your customers are in our market segment?

    b. What is the average implementation time for an organization of our complexity buying the HRIS modules listed above?

        i. How many hours a week are required from your customers during implementation?

        ii. After implementation is complete, are admins able to design new processes, workflows and security profiles (such as a new onboarding flow or new performance management model)?

        iii. What skills/technical knowledge is required to customize the system?

        iv. Will all customizations be able to be completed by our admin team or will we have to hire your team to make customizations?

    c. How does your system manage multi-FEIN organizations allowing us to take both holistic actions and entity-specific actions?

        i. What level of control can we assign to our sub-entities to manage their own workflows, permissions and processes?

    d. Are there areas of the system that we are unable to configure? If so, what features are those and why are configurations limited?

6. **Customer Support.** Please provide an overview of your implementation and customer support model. Specifically highlight:
    a. Will we have a dedicated, named customer support rep after implementation?

        i. Are there any guarantees about that persons' tenure, experience or qualifications?

        ii. Can we have regularly scheduled meetings with our customer support team?

        iii. In what scenarios would we get passed along to a different support member than our named account rep?

    b. What is your SLA?

    c. What is your average response time?

    d. What is the escalation path for major issues?

    e. How is the quality of your support center monitored? Describe any formal quality control programs you have in place.

    f. What level of training will you provide during implementation and after go-live?

        i. Is there a cost associated with additional trainings?

    g. Can you describe your implementation methodology?

        i. What are our responsibilities during implementation and which fall on your team?

    h. What level of support will you provide for filing taxes quarterly/annual taxes?

    i. What happens when a tax filing error is made? Who owns that responsibility and how are those issues resolved?

7. **Reporting**. It is important that our team can report on our workforce in a holistic manner. Please describe how your technology's reporting tools better enable us to stay compliant, understand our workforce's needs and impact the executive strategy. Specifically highlight:

   a. Is it possible to build custom reports that involve data from separate modules (i.e. filter performance review scores from hire source to see where best candidates come from)?

   b. How precisely can we control and tailor the reporting permissions for sub-entities to give their leadership the data they need without seeing outside data?

   c. Can your system support benefits reporting around: census data, ACA reporting, reconciliation reports, enrollment status & confirmation?

   d. Can non-technical users create custom reports, or will IT / customer support assistance be required?

   e. If there is an ability to run predictive analytics or to use ML/AI to predict trends?

   f. What dashboards and metrics can be tracked in the recruitment platform?

   g. How can managers or HR & Payroll track year to date hours in an effective way?

Tier 3 Questions

8. **Talent Acquisition & Talent Management**. We are looking for a system that can support the entire employee lifecycle.
   a. Does your system offer ATS, performance management, employee engagement, compensation management and learning management functionality?

   b. In what ways are your talent acquisition and onboarding tools set up to support organizations that do mass hiring, re-hiring, onboarding and terminations?

   c. Are these modules built by your team or white-labeled / integrated via a 3rd party?

   d. How does your system tie together these different talent management modules to create a single unified experience for employees, rather than a modular experience?

   e. Can administrators report across different talent management modules to have a better view into an employee's profile and development track?

9. **Experience with Similar Companies.** Please provide some information about the work you've done in our industry before. Specifically highlight:
   a. How many event venues are using your solution today?

   b. What aspects of your software and services make your solution particularly well suited for our sector?

10. Is your system SOC II compliant and ISO certified? Please provide documentation

11. Does your platform integrate with Microsoft Office for account provisioning or identity management? If so, how will this help with user management?

12. Can we create granular rules for different user types giving certain teams and employees specific visibility and permissions?

    a. Specifically, can we create a view where IT can only see employee #s, names and work locations

13. Availability & Uptime
    a. Who is your service hosted through?

    b. Is data encrypted in transit and at rest?

    c. What is your historical up time?

    d. Have you had a catastrophic failure in the last 12 months?

    e. When was your last data breach and how was it handled?

    f. What infrastructure redundancies are in place to prevent outages?

    g. What level of training does your internal staff receive around InfoSec?

14. Upgrades & Feature Releases

    a. What is your release path for new releases?

    b. Can we choose to be earlier or later in the release path?

    c. How do we know if there has been a failure with a new feature or upgrade?

    d. Do they provide new release notes on what's changing/new?

    e. What's the notification testing time allowed prior to a new release?

Other Questions

15. What are the three biggest differentiators for your company in the marketplace?

16. What is your average client tenure?

17. What is the biggest reason a client is unsuccessful on your platform?

18. What developments on your 2025-26 product roadmap do you think will be most impactful to our business?

HRIS Feature Capability Self-Assessment: Payroll Functionality

Please provide a 1-4 ranking to the following feature requests. Please only add clarifying comments if they are necessary.

The scoring system should be understood as:
1. Not available in our system = Does Not Support
2. Possible in our system by way of back-end customization = Customization Required
3. Possible in our system by way of front-end configurations = Configuration Required
4. Possible in our system without any configurations or customizations = Out-of-the-Box Functionality

Requirements	Insert a Ranking (1-4)	Clarifying Comments (if necessary)
Payroll		
Employees can check pay stubs		
Direct deposit capabilities		
Automated tax calculations for federal, state and, local		
New hire reporting		
Multiple worksite reporting		
Ability to calculate lived-in versus worked-in tax rates		
Ability to work on pay runs prior to payroll closing		
Ability to make pay changes mid-period and have changes pro-rated		
Ability to make past-dated pay changes without support		
Ability to run multiple pays for employees and have YTD limits respected		
Ability to process payroll in batches by department		
Wage processing - voluntary, involuntary, garnishment & levy		
Integration with general ledger for regular payroll batches & separate g/l update for adjustment/off-cycle payrolls		