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RFP #7831

Talent Management – Fully Integrated HRIS and Payroll System

I. Introduction

A. Objective

Horizon Behavioral Health (HORIZON) is requesting proposals for a Human Resources Information System and payroll processing services in one central system that will address Horizon's current and future Talent Management and Payroll needs.

The solution should support the business processes of Horizon's Talent Management department without the need for duplicate data-entry.

B. Confidentiality

This RFP, plus any other documents released, information provided, discussions, etc., as part of the selection process, are strictly confidential and should not be divulged to anyone who is not directly involved in the preparation of the response. Additionally, all information within this proposal or gained during the RFP or other processes will remain confidential by the vendor. No information or publicity will be allowed to any third party unless specific written authorization is obtained from Horizon.

It is a condition of this RFP that the information provided herein is for the purpose of allowing vendors to submit proposals to Horizon. It may not be used in any other context or revealed to any other party not directly involved in the submission of a proposal in accordance with the terms of the specification.

II. Timeline

A. Request For Proposal Issuance Date

Thursday, July 7, 2016

B. Proposal Deadline

The closing date for receipt of the proposals is: Friday, August 1, 2016, no later than 5 PM. Any proposal received after that time will not be considered. It is the responsibility of the offeror to see that this bid is received in the Purchasing Department by the specified time and date. Date of postmark is not considered. Telephone, telegraph and facsimile proposals are not acceptable.

C. Question Deadline & Contact Information

Questions concerning this RFP should be directed, in writing by emailing: tonya.raysor@horizonbh.org, or fax: 434-455-3431 or mail: 2241 Langhorne Road, Lower Level, Lynchburg, VA 24501, attn.: **Tonya Raysor** in the Purchasing Department no later than 21 days prior to the closing date of the proposals. Any revisions to the solicitation will be made only by written addendum issued by the Purchasing Department.



III. Business Background

A. Horizon Behavioral Health

Horizon Behavioral Health is a tax exempt political subdivision of the Commonwealth of Virginia. It has facilities in the surrounding area to provide Services for Mental Health, Intellectual Disabilities, Substance Abuse and Prevention. Our portfolio of services include case management, housing, services, school based, psychiatric, outpatient and intensive services. Horizon serves more than 10,000 clients, and has approximately 810 employees throughout 23 locations.

Horizon processes semi-monthly payroll for about 50 employees and monthly payroll for approximately 760 employees of which we estimate 712 are full time benefit eligible and are considered either exempt or non-exempt under the Fair Labor Standards Act. There are three departments (Housing, Crisis Stabilization & Emergency Services) that have 24 hour operations. Currently, 100% of Horizon employees receive pay through direct deposit.

We operate under a 37.5 hour work week that begins at 12:01am, Sunday and ends at midnight the following Saturday night. Different work schedules are utilized depending on the department. Overtime is accrued in accordance with the Fair Labor Standards Act, and as otherwise permitted through Agency policy (i.e. holidays, sick leave, annual leave and jury duty leave are not treated as hours worked.) Employees report to work at several facilities throughout the surrounding area.

B. Horizon – Talent Management

Horizon's Talent Management department is a 10 person department responsible for:

- HR Management
- Recruiting
- Benefit Administration
- Leave Administration
- Workers Compensation
- Performance Management and Evaluations
- Job Descriptions
- Compensation
- Attendance
- Training
- Payroll
- Timekeeping

C. Current Systems

Horizon currently utilizes:

- SAGE ABRA v. 10.3058 last updated 2012
- Halogen
- Cyber Recruiter v.8.1.3.0 last updated 8/4/2014
- My Learning Pointe

Horizon currently outsources payroll processing, time/attendance, wage garnishment and paid leave management system to ADP.

The HRIS system must interface with:

- Halogen
- My Learning Pointe
- Abila MIP Fund Accounting

Horizon is requesting a single integrated system for payroll processing as well as HRIS.



IV. **Proposal Response Format**

This section outlines the format in which the vendors are required to respond to this invitation. All vendors will be required to provide the information as specified. General information which is not specifically requested should be attached separately and clearly labeled “**Supporting Material.**”

All proposals and required documents shall be submitted as one original and three (3) copies of the proposal.

Proposals should be not be extensive but should convey enough information for the Agency to evaluate the ability of your organization to provide the requested services. **Proposals must contain the following, in this order:**

A. Company

- Name and address
- The name of the contact person that Horizon should contact for questions and clarifications concerning your company’s proposal. Include phone number, fax number and e-mail address.
- Brief history of the company to include total number of years in the business of furnishing products and services as requested in this RFP.
- Organizational structure of the company including subsidiaries, partnerships or parent firm. Include the total number of full-time employees.
- Listing of office locations. Specifically note the location of the office and the hours of operation that would be responsible for providing technical support to Horizon.
- A listing of personnel employed by vendor who would potentially be assigned to perform the proposed contract, including such employee’s certifications, qualifications and experience.
- An explanation of the vendor’s approach to problem resolution and how the vendor will deal with problems that may arise in the operational use of its software.

B. References and Clients

- A representative listing of references that Horizon may contact. Please include:
 - References where vendor has performed and completed engagements similar to this RFP
 - For reference locations whose software applications most closely match Horizon’s requirements, please outline the business activities carried out at these sites and their use of your package.
 - Vendor should include at least three references and preferably five.
 - Include the length of the relationship with each client used as a reference.
 - Please include contact information for each reference.
- List all clients who are local governments of similar size or larger.

C. Other Information

Please also provide us with any other information, which you see as relevant, specifically any known weaknesses that the product has in terms of functionality or implementation/training requirements.

D. Maintenance and Support

Vendors are required to provide the following information related to the support and maintenance of the proposed solution.

- Software maintenance charges and the spectrum of activities covered under such maintenance contracts (new releases, bug fixes, etc.)
- Software support availability (Help Desk, hotline, etc.) and duration for which they are available.
- Response time to support inquiries from Horizon.
- Standard hours during which support will be provided and out of hours support options and costs.
- Number of staff in the software support team.
- Frequency at which new versions of the software are released.
- Release date for the first version of the software.



E. Technical Proposal

The RFP document must have a summary section containing the following information:

- Name of the package(s) being offered, version number, etc.
- Broad functional fit to the specifications in the Statement of User Requirements.
- Hardware platforms recommended and alternatives
- Application Environment
- Number of sites where package is implemented. Number of sites for the version proposed.
- Approximate cost of implementation broken down by:
 - Software Acquisition and Installation
 - Application Software
 - Data Access Software
 - Database Software
 - System Management Software
 - Development/Testing Software
 - Hardware Acquisition and Installation (if necessary)
 - Application/Database Server
 - Backup Server
 - General Project Cost (consulting, travel expenses, etc.)
 - Installation
 - Customization
 - Maintenance and Support
- Other Costs

F. Compliance to user need and requirements

Vendors should provide a specific affirmative response to each of the requirements and preferred components set out in Section V and Exhibit A of this RFP. Failure to respond to any of the Required (R) items may eliminate the vendor's proposal from further consideration.

The proposal should follow the same numbering system as this RFP. Vendors should respond to each item with a SD (Standard), MC (Moderate Change) or SC (Significant Change) answer.

The definitions are as follows:

SD Requirement is standard to application software; no modification needed.

MC Application software will satisfy this requirement with moderate modification (to be accomplished within 2 days)

SC Significant customization (beyond 2 days) is needed to satisfy the requirement. Where a specific requirement cannot be fully met, or an alternative solution is proposed, comments should be included (i.e. the cost of basic tailoring, how much time is needed, etc.)

G. Cost

- A description of the services offered by the vendor and the billing rates for these services in accordance with the requested services as described in the RFP.
- A description and itemization of the cost of the software itself.
- A description and itemization of the travel schedule and associated travel, lodging, meal or per diem expenses for any of the vendor's staff who will spend time working with Horizon.
- A description and itemization of the training expenses, assuming all training held at Horizon locations.
- A description of any licensing, maintenance, and support fees associated with any software and/or hardware employed in the proposed applications. These fees should be listed as follows:
 - i. Fees for first year
 - ii. Total fees for a 3-year period
 - iii. Total fees for a 5-year period



Include a list of items included in the maintenance agreement. Any additional costs or constraints on the proposed licenses should be clearly stated.

- Detail any costs not included in the proposal above.

Software costs should highlight the difference between standard core licenses, modules and enhancement costs and third party software licenses. Wherever a vendor is supplying items of a different manufacturer, the manufacturer and model numbers must be indicated.

H. Contracts

The vendors must indicate nature of contracts and agreements they are willing to enter into. The information to be provided includes:

- Sample contracts
- Payment terms – details of payment settlement options
- Period for which the price quotes will hold (6 months preferred)
- Guarantees against the system non-performance
- Penalty clauses
- Any other vendor constraints

V. Needs and Requirements – Refer to Exhibit A

In addition to the items below, the system must be capable of performing all the items listed in Exhibit A.

Codes

SD - Standard	Requirement is standard to application software; no modification needed.
MC – Moderate Change	Application software will satisfy this requirement with moderate modification.
SC – Significant Change	Significant customization is needed to accomplish the stated objectives. Add on module is needed that will integrate with system.
NA – Not Applicable	Application software does not support requirement or optional requirement.

A. Functional Specifications

No.	Description	Detail	CODE	Comments
1	HR Management functionality	System will have ability to cover many HR aspects from application to retirement. Ability to record basic demographic, and address data, selection, training and development, capabilities and skills management, compensation, planning records and other related activities. Furthermore, must retain historical data.		
2	Payroll functionality	System will have ability to automatically capture and process payroll. Ability to gather and record various salaries, wages, bonuses, OT, taxes and deductions all on one universal system. In addition, must be able to generate manual pay checks. Must be able to create quarterly and yearly tax reports. Furthermore, must have capability for direct deposit feature and live check feature. Must have ability to allocate.		
3	Timekeeping functionality	Employees will have ability to clock in and out through the system and automatically sync with payroll all on one universal system. In addition, employees will be able to access the timekeeping system from their workstations. Furthermore, the timekeeping system will provide broad flexibility in data collection methods, labor distribution capabilities and data analysis features. Must have ability to allocate.		



No.	Description	Detail	CODE	Comments
4	Attendance functionality	System will have ability to assign points based on attendance patterns all on one universal system.		
5	Attendance & leave accrual tracking	System will have the ability to track attendance and leave accruals all on one universal system. Must be able to track and accrue multiple attendance and leave types for each employee. Employees will have ability to request leave through this system.		
6	Job and Pay History Function	System will have ability to track historical data for employee pay and job histories.		
7	Ad hoc report writing	System will have a robust reporting ability all on one universal system.		
8	Integration with MIP	System will have ability to integrate with current MIP, including alignment of general ledger numbering system. Horizon utilizes a general ledger system with up to 11 segments.		
9	Integration with Halogen	System will have ability to integrate with current system; Halogen.		
10	Integration with My Learning Pointe	System will have ability to integrate with current system, My Learning Pointe.		

B. Other Specifications

No.	Description	Detail	CODE	Comments
1	Recruiting Software	System will have ability to manage the entire recruiting process from creating vacant job requisitions to scheduling interviews and sending email alerts to onboarding to transferring data to the HRIS system. Furthermore, must have ability to recruit through online recruiting sites or publications, track applicant in system and retain historical data. Ability to automate hire and turndown process.		
2	Employee Self-Service	System will have ability for employees to query data from the HRIS system and perform some transactions over the system, i.e. updating address, phone number, printing attendance record, etc.		
3	Benefits Administration and Open Enrollment	System will have ability to administer and track employees participating in benefit programs to encompass insurance, compensation and retirement. System will have ability to communicate with 3rd party benefit programs to enroll employees and communicate back with HRIS system all online. System will have ability to generate benefit related reports on each individual. In addition, system will reduce the effort required by the TM department for benefit open enrollment through online enrollment.		
4	Benefits Messenger	System will have ability to communicate with 3rd party carriers about benefit updates or changes to employee benefits and will communicate back to HRIS system. System will have ACA tracking & reporting capabilities.		



No.	Description	Detail	CODE	Comments
5	Performance Appraisal	System will have ability to systematically and periodically assess an individual employee's job performance and productivity in relation to certain pre-established criteria and organizational objectives. Furthermore, must have ability to alert supervisors of upcoming performance appraisals and must have electronic steps to signing off on performance appraisal. In addition, must have ability to produce reports around completion rates. System must be able to retain historical performance evaluation data.		
6	Position Control	System will have ability to track actual staffing levels and costs over time. System will have ability to track positions separate from employee. In addition, system will have ability to track vacancies, integrate the hiring process into daily management of departments, prevent budget deficits and more accurately, plan staffing and salary budgeting.		
7	Leave Administration Tracking	System will have ability to track leaves of absences following State or Federal Leave laws. Furthermore, communicates with TM personnel when leaves are close to expiring.		
8	Job Descriptions	System will have ability to electronically create and store job descriptions for each position. Furthermore, system will have ability to electronically send end user job description for electronic signature. System will have ability to retain historical data.		
9	AD Integration	System will have the ability to sync employee logins and person information with Active Directory.		

C. Technical Requirements

No	Description	Comments
1	It is Horizon's intention to only look at applications that are "cloud" based or hosted systems. In order for ease of use, Horizon staff would use various browsers, including, Internet Explorer or Chrome to access this system from anywhere they are working. It will be the vendor's responsibility to maintain all servers associated with this cloud based solution including virus protection and all Windows Server management and security. The vendor will be solely responsible for all software updates and patches and must notify Horizon of updates and patches within a reasonable timeframe. Horizon prefers that software updates and patches are completed during non-business timeframes, preferably into a test environment first so we can verify and train. It is preferable that this cloud based solution be available 99% of the time.	
2	The vendor must provide all disaster recovery steps related to this cloud based solution including backups and restores. It is preferable that complete backups are done nightly and differential and incremental backups be done during the day in order to have a stable disaster recovery solution. The vendor will provide the differential and incremental backup schedules they provide so Horizon can determine if that meets their requirements.	
3	Horizon has several separate software applications, that when combined, make up the HRIS. It is the intention of Horizon to ensure that all existing data be transferred/migrated or moved into the appropriate vendor's application. Horizon requires a detailed project plan, once a vendor has been chosen, to list the steps in detail of how the vendor will ensure all of Horizons data is moved and is tested. In the event any of Horizon's historical data can't be migrated to the vendor's new system, the vendor must provide Horizon with options so that the systems data can be available in some form or another.	



No	Description	Comments
4	Please describe the system capacity for expansion (growth, scalability.)	
5	Does the system require any other computer software of a specific type or from a specific provider? If so, please describe.	
6	How often are updates released? Please provide details about updates, i.e. system, critical, scheduled. How are updates to be administered?	
7	Please describe implementation process including length of time.	
8	Please describe any and all customization that is required to meet the specifications outlined in this RFP.	
9	How is backup/recovery accomplished?	
10	Licensing must allow a separate test environment. Please describe any limitations of the test environment installation. Test environment should be updated periodically to match live.	
11	What are your recommended and minimum required storage and server specifications? Please provide details.	

VI. Contract Award and Development

- A. The Competitive negotiation method of selection will be used to determine the most qualified Offeror among those submitting proposals. Proposals will be evaluated in accordance with the "proposal evaluation criteria" in the RFP. Negotiations shall be conducted, beginning with the vendor ranked first. If a contract can be negotiated at a price considered fair and reasonable, the award shall be made to that vendor.
- B. The content of the RFP and the successful Offeror's proposal will become an integral part of the contract, but may be modified by provisions of the contract. Offerors must be amenable to inclusion in a contract of any information provided either in response to this RFP or subsequently during the selection/negotiation process. The information received will be considered contractual in nature and will be used in validation and evaluation of proposals and in subsequent contractual action.

VII. Proposal Evaluation Criteria

Proposals will be reviewed in accordance with the following evaluation criteria:

Review Item	Available Points	Awarded Points
I. Vendor's Qualification and Experience	15	
II. Client References	05	
III. Technical Overview Reporting capability Conversion from existing system User interaction with system Security Support services Added value by vendor (consulting, development, etc.) Platform and licensing Web-based capability Other considerations	15	
IV. Cost proposal	10	
V. Recent Experience with comparable Municipalities or Governmental Entities	5	
Total Points	50	



VIII. General Terms and Conditions

- A. Offerors who submit a bid in response to this RFP should also be available at a mutually agreed upon date to present either live or remotely all RFP items on a demo system to verify functionality. This will provide an opportunity for the offeror to clarify or elaborate on the bid. The agency will schedule the time and location of these presentations.
- B. No member of the governing body, officer, or employee of Horizon during his/her tenure or for one (1) year thereafter shall have any interest, direct or indirect, in this contract or the proceeds thereof.
- C. This RFP is an invitation by Horizon to submit an offer which may be subject to subsequent discussion. Submittal of a proposal does not create any right in or expectation to a contract with Horizon. Horizon reserves the right to accept all or vary, in detail, the final requirements, or reject any proposal. Horizon requires that contracts covering the provision of services and equipment requested in this RFP be negotiated to the satisfaction of Horizon.
- D. Horizon may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the work, and the offeror shall furnish to the agency all such information and data for this purpose as may be requested. The agency reserves the right to inspect offeror's physical plant prior to award to satisfy questions regarding the offeror's capabilities. The agency further reserves the right to reject any offer if the evidence submitted by, or investigations of, such offeror fails to satisfy the agency that such offeror is properly qualified to carry out the obligations of the contract and to complete the work contemplated therein.
- E. All proposals submitted under the RFP will become the property of the Horizon Behavioral Health Board and will not be returned. In accordance with the Virginia Public Procurement Act: "Trade secrets or proprietary information submitted by a bidder, offeror, or contractor in connection with a procurement transaction shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the bidder, offeror or contractor must invoke the protections of this section prior to or upon submission of the data or other materials, and must identify the data or other materials to be protected and state the reasons why protection is necessary."
- F. The Horizon Behavioral Health Board will not be responsible or pay for any expenses incurred by a potential offeror in the preparation of any proposal or their evaluation of it.
- G. Proposals received after the date and time stated will not be considered. It is the responsibility of the offeror to see that his bid is received in the Purchasing Department by the specified time and date. Date of postmark is not considered. Telephone, telegraph and facsimile proposals are not acceptable. Moved to section B
- H. It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- I. By submitting a Bid, the Offeror covenants and agrees that he has satisfied himself, from his own investigation of the conditions to be met, that he fully understands his obligation and that he will not make any claim for, or have right to cancellation or relief from the contract because of any misunderstanding or lack of information.
- J. Payment shall be made upon 30 days receipt of accurate and complete monthly statements.
- K. By signature on this solicitation, bidder certifies that it does not and will not during the performance of the Contract employ illegal alien workers or otherwise violate the provisions of the Federal Immigration Reform and Control Act of 1986.
- L. By written notice to the Contractor, Community Services may from time to time make changes, within the general scope of the Contract, in the services provided by the Contractor. The Contractor shall promptly comply with the notice and shall perform services in conformity to the notice. If any such change causes an increase or decrease in the Contractor's cost of performance, an equitable adjustment in the payment rate shall be negotiated and the contract modified accordingly by written supplemental agreement.



- M. The Contractor shall adhere to the rules and regulations proclaimed by the Purchasing Agency regarding the confidentiality of client related information during and after the term of the contract.
- N. If the Contract involves patient care, the contractor will adhere to the standards set by the Purchasing Agency regarding quality assurance and participate with the Purchasing Agency in the systematic and ongoing monitoring and evaluation of patient care.
- O. Failure to submit a bid as outlined shall be a cause for rejection of the Bid. Modification of or additions to any portion of the solicitation may be cause for rejection of the Bid; however, HORIZON reserves the right to decide, on a case by case basis, at its sole discretion, whether or not to reject such a Bid as nonresponsive.
- P. HORIZON reserves the right to conduct any inspection it may assume advisable to assure supplies and services conform to the specifications.
- Q. Any payment terms requiring payment in less than thirty (30) days will be regarded as requiring payment thirty (30) days after invoice or delivery, whichever occurs last. However, this shall not affect offers of discounts for payment in less than thirty (30) days.
- R. In case of failure to deliver services in accordance with the contract terms and conditions, HORIZON, after due oral or written notice, may procure them from other sources and hold the Contractor responsible for any resulting additional purchase and administrative costs.
- S. A contract shall not be assignable by the Contractor in whole or in part without the written consent of the Executive Director of HORIZON.
- T. By submitting their proposals, all Offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their Bid, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
- U. The agency reserves the right to cancel any subsequent contract at any time the agency, at its sole discretion, deems it to be in the agency's best interest to do so by giving the contractor 30 days written notice. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver or perform on all outstanding orders issued prior to the effective date of cancellation.
- V. By submitting their proposal, all bidders and offerors certify to the Horizon Behavioral Health Board, Virginia that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians with Disabilities Act, The Americans with Disabilities Act, Section 11-51 of the Virginia Public Procurement Act, and the Lynchburg Procurement Ordinance.
 - 1. During the performance of this contract, the contractor agrees as follows:
 - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex or national origin, except where religion, sex or national origin is a bona fide occupational qualification reasonable necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.



- c. Notices, advertisements and solicitations placed in accordance with Federal Law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
- 2. The contractor will include the provisions of the foregoing paragraphs a, b and c in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
- W. By submitting their bid/bid, all bidders and offerors certify to the Horizon Behavioral Health Board that: During the performance of the contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
- X. HORIZON reserves the right to award a contract to a bidder based on "best value" (as defined in the Virginia Public Procurement Act, July 2005), which means the overall combination of quality, price, and various elements of required services that in total are optimal relative to the needs of HORIZON.

IN COMPLIANCE WITH THIS INVITATION FOR BID AND TO ALL THE CONDITIONS IMPOSED HEREIN, THE UNDERSIGNED OFFERS AND AGREES TO FURNISH THE SERVICES IN ACCORDANCE WITH THE ATTACHED SIGNED BID OR AS MUTUALLY AGREED UPON BY SUBSEQUENT NEGOTIATION.

Company Name and Address:

_____ Date: _____

_____ Name: _____
Signature in Ink

_____ ZIP _____ Title: _____

Telephone: _____ Print Name: _____

Fax: _____