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

Opening

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

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

A few of the topline/key requirements include:

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

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

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

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

Body

Talent Acquisition

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

Requisitions:

Describe the creation of requistions

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

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

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

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

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

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

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

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

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

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

Applicants/Candidates:

Explain how your system supports employee referrals and tracking.

Describe how your system dispositions candidates

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

Depict how the system captures and defines candidates

- Active
- Passive
- Pooled
- Pipeline

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

- Update the New Hire List

Differentiate how your system assists in sourcing candidates

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

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

Define the maintainance of resume/application changes.

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

Explain how pre-screenings are processed

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

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

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

Identify if your system offers correspondence templates and provide examples.

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

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

Specify how your system offers Candidate self service.

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

Pooled and/or Passive Candidates:

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

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

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

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

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

SCF highly utilizes centralized panels and pooled candidates.

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

Alerts and Notificaitons:

Denote your Alert and Notifications messages.

- Alert the role has been posted

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

Reports and Dashboards:

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

Describe the tracking and reports methodology for:

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

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

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

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

Social Media/Job Boards:

Describe how the recruiting feature connects with social media.

Indicate your interface with and support of Social Media platforms

- LinkedIn, Twitter, Facebook, etc.

Define how postings may be indexed to other sites.

Explain your system offers job board management.

Identify the system's interface with job boards.

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

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

Descibe how applicants can apply through different Social Media venues.

Other:

Explain how your system ulitizes the tag function.

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

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

- Explain which functions are not available.

Classify access through all browsers and explain any limitations.

Relate how your services provide

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

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

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

List what Training is available to Recruiters

- Best Practices
- Use of System

Batch Clean-up

- Duplicate applications
- Duplicate requisitions
- Batch Dispisitions

Indicate if your system offers CRM-MS Outlook interface.

Specify if your system offers a shared calendar.

Explain how your system handles email marketing campaigns and matrix.

Explain your system's offer of Keyword searches.

Explain your system's mail merge functionality.

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

- Define any limits to the number of applications types

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

Define how the recruiting feature connects

- With on-boarding
- With payroll

On-Boarding

Define the ability to produce:

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

Support the claim that your system maintains a positive experience.

- Personalize messages
- Instructions and/or expectations

- Training videos
- Social media contact

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

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

Scheduling

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

Time & Attendance

Address tracking time & attendance

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

Time and attendance replacement

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

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

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

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

- Standard schedule
- Flexible schedule
- Modifications

Indicate if the system may be modified to add additional information

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

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

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

Payroll/Finance

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

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

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

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

Distinguish how you manage all the electronic communications

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

Describe how your system integrates with and manages Payroll

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

Compensation

Provide an overview of the key compensation features of your system

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

Describe how your system enables a manager to

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

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

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

Benefits

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

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

Describe the Self-service capability requirements

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

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

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

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

Provide an overview of Retirement processes

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

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

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

Talent Management/Succession Planning

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

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

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

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

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

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

Describe your Succession Planning Systems

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

Competency, Certification and License Tracking

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

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

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

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

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

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

Data Services

In a hosted system, how do you manage

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

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

Outline how you manage backups and retrievals.

IT

Provide an overview of your system architecture

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

Describe your software development lifecycle.

Distinguish how you ensure your system stays current.

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

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

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

Describe your issue resolution system

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

Describe your Risk, Compliance and Security approach and results

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

Outline implementation, transition and start-up procedures

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

Describe the options for configuring the application

- Standard (Live), training, Development, Testing

Define who has responsibility for maintaining customization changes/versions

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

Provide a list of:

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

Mobile

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

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

There are mobile workers within SCF

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

General HR Processes

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

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

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

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

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

Describe how Leaves of Absences are managed within your system

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

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

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

- At the employee, manager and HR levels

Outline the termination process within your system

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

Relate how your system manages contingent labor

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

Describe how positions are managed

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

- Define attributes that a job controls

Clarify how the system will pre-populate additional areas (such as):
- Personal Action Requests
- Training
- Benefits

Content Management

Define how your system handles
- Archiving
- Building Forms
- Digital Document imaging
- Document and Record Retention
- Document management
- Full text and Meta Data Searches
- Signing and Versioning

Training

SCF has a separate Learning Management System (LMS)
- Describe what LMS functionality is included.

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

Define ongoing training management
- New SCF people on the same system
- For System changes/upgrades

Reports

Describe how reports are created
- Initial writing, new, on-going changes
- Templates, Definitions
- User defined and build outs
- Integrated report writing capability

Describe how users will have access to standard reports.
- Dashboards, templates
- Create new reports/analytics and add fields - self-service
- Detail your service to assist or create more complex reports

Define the import/export formats
- Excel, Word, PDF, other
- CSV, XML, other

Describe how security is maintained and centralized
- Standard reports
- Ad Hoc reports

Specify how the system maintains employee hierarchy.

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

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

Outline Organizational Charts capabilities:
- Solid line / Dotted line
- Division/Department/Location
- Per employee w/multiple positions

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

Customer Service

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

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

Review your customer renewal rates.

Implementation Processes

SCF is in full operational mode with a limited amount of available resources
- Define your preferred implementation process
- What pre-Installation services do you provide

Distinguish who you use for the actual installation.

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

It is anticipated there will be a Phased Approach to implementation
- Identify your method of orchestrating a Phased Approach
- Pre-Implementation processes, assistance, forms, etc.

Transition Processes

Describe your transition processes
- Mass data Transfer/formats
- Special Requirements required
- Typical time required

Out of Scope at this time

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

These areas are not part of this immediate installation:
- Full Payroll management: However, bi-directional feeds with Serenic Navigator and other systems will be required
- Performance Management: Bi-directional feeds with SCF created systems
- LMS: Bi-directional feeds with SCF created systems
- Expenses: Concur is SCF's Expense and Travel management process, all systems must have bi-directional feeds
- Asset Tracking: how aligning certain materials/items with employees (computers, phones, etc.) might be appropriate
- Project Tracking

Pricing Model:

Define your pricing model for each step of the process:
- Purchase
- Project Scope definition/Clarification
- Start-up
- Implementation
- Transition
- User Acceptance Testing
- Training
    - Initial
    - On-going
- Updates/Upgrades

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

Delineate your invoicing and payment methods

- Initial payment
- Ongoing payment timing and amounts

Timeline:

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

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

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

Must Provide:

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