

Vendor Questions and Responses

OCLD RFP HRIS 24-002

1. What is the preferred initial term of the contract? (ie. 3 years, 5 years, etc.)

Response: Please provide single and multi-year terms for consideration.

2. Would the agency prefer to implement all products in scope in Year 1 or would staging implementations be considered? (ie. CoreHR/Payroll/T&A/Benefits in Y1 and Recruitment/Development in Y2)

Response: We will consider the best approach based on the expertise and recommendations of the selected vendor.

3. Please let me know if you are just looking for the compliance answer from the drop down boxes or if you are looking for text in the comment fields, too.

Response: If your product can meet the requirement, the drop down is all that is needed. The comment field can be used to provide any additional details or how a requirement might be met in another manner.

4. OCLD Statement on the title page: ***This request includes an HRIS with an optional, add alternative, ERP if available in the same system and not a partner ERP.***

a. Would OCLD accept a response from an ERP vendor who resells a market-leading HCM solution as part of their overall ERP offering?

Response: This is no if the ERP and HRIS are not the same company. This is yes if the ERP and HRIS are the same company.

5. **Payroll Tab:** Index 9: This requirement references T4 forms, does the library have employees located in Canada?

Response: We do not have employees outside of the United States. All employees are based in Florida and 1 employee is based in another state due to a special circumstance due to a business need. We do not anticipate extending other employment opportunities outside of the State of Florida.

6. **Benefits Tab:** General question: Does the Library use a third party administrator for ACA forms or COBRA administration?

Response: We use Medcom for fringe benefit administration but are open to using your HRIS to bring it back in-house.

7. **Time and Attendance Tab:** Index 37: Does the Library use a third party to manage Family Medical Leave? If not, how are Leave cases managed today?

Response: FML is currently managed in-house, we have a database that tracks our FML administration. We were looking for an HRIS to help us with administering this service in-house to generate forms and align with your time management system.

8. **Scheduling Tab:** Index 6 and 19: What type of shift bidding does the Library do today?

Response: We do not have shift bidding in house, Managers set schedules manually. We are open to a system that can offer these services.

9. **Scheduling Tab:** Index 14: How does the Library define rostering?

Response: Rostering is defined by how schedules are created and maintained. Employee lists are defined as name, location, position and PT/FT status. Signifying which employees are available or who is on leave.

10. **Succession Tab:** General question: Where does the Library manage succession planning today?

Response: We have a performance management system, where goals, performance reviews and development plans are tracked. We are looking for an HRIS to be inclusive of these features.

11. Workforce Planning Tab: Index 1: Where is capacity data stored?

Response: On our private server / cloud based.

12. Workforce Planning Tab: Index 3: What type of attendance opportunities is the Library looking to analyze?

Response: We are looking to monitor scheduled hours, tardies, extended lunch and early leaves. Unscheduled absences, how absences are covered with PTO/Flexible holidays.

13. Workforce Planning Tab: Index 4: Where is benchmark data stored?

Response: We have a performance management system, where goals, performance reviews and development plans are tracked. We are looking for an HRIS to be inclusive of these features.

14. Workforce Planning Tab: Index 9: Can the Library provide more detail around this requirement?

Response: We are looking to calculate the amount of time an employee adjusts their normal schedule to support a business need. For example an employee is scheduled to work 9-5 (8 hours) per day Monday to Friday, they choose to work 9-9pm (12 hours) on Monday and adjusts their normal schedule to work from 9-1 (4 hours) on Friday, we want to track how many hours an employee deviates from normal scheduled hours to support business needs. We can also use this data to help predict future scheduling needs.

15. Workforce Planning Tab: Index 10: How are attendance management program KPI's defined? What kind of plan are they correlated?

Response: Our performance expectations are similar to a point system, we track the amount of tardies and early leaves, as well as how many unscheduled hours are used. When an employee exhausts their allotted time they move into progressive discipline.

16. Is Orange County permitted to use offshore resources for this RFP and outline any necessary approvals or documentation required?

Response: Depending on location, offshore resources and support can be utilized. Data must be stored on servers located within the United States.

17. What are the top existing constraints and limitations with the current financial system and overall technology architecture that the County is looking to solve with a system replacement?

Response: We need robust reporting (export to Excel, automatic report distribution, etc.) and journal entry importing capabilities. An all-in-one system to include fixed assets inventory and depreciation.

18. What is the County's experience with change management? Any lessons learned from previous deployments?

Response: This will be the first full implementation of an HRIS platform for OCLD.

19. How effectively does information flow out to different County populations (i.e., the complexity associated with communication delivery)?

Response: This will be a staff only platform and not utilized by the public.

20. Does this initiative represent a significant change in the types of skills/capabilities that are required (i.e., the complexity associated with end-user training)?

Response: No

21. How many financial institutions do you utilize? Please list the number of bank accounts.

Response: 2 financial institutions and 3 bank accounts.

22. How many unions and collective bargaining agreements do you have?

Response: None

23. Do you need to track time by projects?

Response: No

24. Do you provide and need to track retirees in the new system?

Response: Yes

25. Are there any systems outside of your legacy system used to track historical data? If so what systems?

Response: No

26. Will there be a designated resource for this project to lead Data Conversions? Is this resource capable of populating standard data conversion templates?

Response: There is a project manager that can help with any resources or needs from OCLD during the project.

27. Which external benchmarking vendors for titling, salary range, and benefits by location will need integrations to/from the new HIRS system?

Response: If the HRIS cannot replace all current systems, they will need to integrate with the following:
Applicant Stack - Recruiting/Onboarding

Verified First - Background checks
E-Verify - Employment eligibility (I9 forms)
Caspio - Exit Surveys
Central Square/COGNOS - Payroll/Reporting
ATS - Employee Paystubs/W2
Benelogic - Benefits enrollment, open enrollment
Docuware - Employee documents
Executime (Tyler Technologies) - Time and attendance
Halogen – Saba Talent Space - Evaluations /Performance Management
JJKeller FMLA Manager - FMLA tracking
SumTotal - Learning Management System

28. Does the County have any blackout durations which we should consider while formulating the project plan?

Response: No changes to the financial system can occur during Q1 of each fiscal year (October - December).

29. When is the County looking to go live with the new HRIS system? Is there anything driving the need to go live by a certain date?

Response: We want to go live as soon as it is feasible. There is no date driving the deployment at this point.

30. OCLS is requiring 10 copies delivered in 10 three-ring binders along with a digital copy on a flash drive. We are a cloud-based organization that strongly favors electronic submissions when considering which RFPs we respond to. Will the Orange County Library System reconsider their position on requiring physical copies and accept a bid via electronic submission only?

Response: No.

31. Could you please provide information or network diagrams regarding your current ERP vendor, misc systems or SaaS Subscriptions and any integrations that system utilizes to ingest data from other systems in your enterprise Environment?

Response: Our current ERP system is: CentralSquare NaviLine. No current integrations.

32. Per the RFP, the library is budgeted for 533 Employees. Is this employee headcount to use for the formal service fee quote?

Response: Yes, with a cost breakdown per employee. OCLD estimates headcount will increase to 600 over the next couple of years.

33. What is OCLS payroll frequency (Weekly, Bi-Weekly, Semi Monthly)

Response: Bi-weekly

34. Does OCLS intend to integrate with existing clock hardware. (Appendix A – Time and Attendance – Line 17 & 19) RFP States RFID Hardware.

- If Integration, what hardware and manufacturer is in place today? Or, purchase/lease new/alternative hardware provided by HRIS vendor.
- How many clocks and what type of clocks would be needed. (Ex. RFID – Badge (POE))
- New RFID cards would be needed for new clock hardware. How many cards needed for initial quote?

Response: Currently only web-based (browser or app) clock in/out will be needed.

35. Please provide a listing of the type of employees (full-time, part-time, contractors, interns) the Library has, along with a count for each category.

Response:
Full-time – 338
Part-time – 132

36. Does the Library have a desired budget for this project?

Response: No

37. Does the Library have a desired project go live date?

Response: We do not at this point since we are unsure how long the implementation process will take. We do want to go live as soon as it is feasible.

38. Is the Library planning to utilize the proposed vendor's expense module for employee expenses?

Response: OCLD is open to migrating to the new platform.

39. Briefly describe your organization's culture and estimated level of resistance to change/adoption of technology.

Response: OCLD is an innovative organization with a highly skilled, engaged and adaptable workforce.

40. Are there change management specialists in-house and do they have bandwidth to assist with this initiative (i.e., stakeholder and readiness assessments, communications, change champion network, training materials and delivery, and post go live sustainment strategies)?

Response: We have staff that can assist with this initiative's needs.

41. What is your organization's maturity as it relates to employee self-service and manager self-service?

Response: OCLD has highly capable employees and managers. With the proper training and training materials, staff will learn new processes effectively.

42. Have you defined your Vision, Guiding Principles, Objectives, Value Statements, and/or Success Metrics for the project?

Response: Yes, the objective is to implement an HRIS that will reduce HR staff time processing new staff, reduce the possibility of errors, and provide one place for all OCLS staff to access for their HR needs. An ERP will provide current financial tools to the Finance department that will allow for more robust reporting features as well as additional features to potentially expand access.

43. Have you identified any challenges or gaps with your current processes?

Response: Yes, this is outlined in the Background section of the RFP.

44. Have you documented all the touchpoints to processes outside of the system of record such as integrations, reports, or interpersonal communication?

Response: No

45. Does the Library have any unions and/or collective bargaining agreements?

Response: No

46. Do you have workers with multiple positions?

Response: No

47. How many payroll FEINs and pay groups does the Library have?

Response: 1

48. How many pay frequencies (weekly, bi-weekly, semi-monthly) do you have and which ones?

Response: Bi-weekly

49. Are you considering a vendor (i.e., ADP, OSV) for tax filing and garnishments?

Response: No

50. Will you use external time clocks that feed time into the proposed system, or do you intend to utilize the proposed vendor's time tracking for clock in/out, time entry methods?

Response: The intention is to utilize the new system for time keeping if it meets our needs. Currently only web-based (browser or app) clock in/out will be needed.

51. Approximately how many time entry codes (types of hours worked) do you have?

Response: 14 parent codes, 22 children, 36 total.

52. How many managers will be assigning schedules/how many supervisory organizations will use scheduling?

Response: Potential for 20-30 departments to use scheduling.

53. Are the workers sitting in each supervisory organization able to see the schedule of others reporting to their manager? Can they be on the same schedule together?

Response: Yes and Yes

54. What qualifications define who should get scheduled and when (e.g., role, location, seniority)?

Response: Managed manually

55. Will the Library need to enable the proposed vendor's learning module for external workers?

Response: No

56. Do you intend to use the proposed vendor's system for Learning?

Response: Yes, depending on content offered.

57. Does the Library need to track retiree benefits?

Response: Yes

58. When is the Library's benefit open enrollment period?

Response: 10/21/2024 - 11/08/2024

59. Please provide the total number of benefit plans and the vendors for each plan.

Response:

United Healthcare - Healthcare

Metlife - Dental and Vision.

Lincoln Financial - Disability, Life AD&D.

MissionSquare - 401/Retirement

Medcom - FSA

60. How many purchase orders per month?

Response: Approximately 40 per month.

61. Number of capital assets?

Response: As of 9/30/23, we had 2,472 capital assets. This number will grow to over 3,000 in the next 3 years.

62. Do you have any procurement cards or travel/expense cards? If so, are they separate programs? Amex, VISA, or MC; and who is the bank administering the program?

Response: We have a corporate card program where approx. 10 employees use company credit cards to make purchases. This is through Truist Bank.

63. How many active awards (i.e., grant contracts) does the Library have?

Response: Typically between 10-20 active awards at any given time.

64. Can the Library provide a list of all current integrations, or a systems diagram, along with their intended purpose?

Response: Not at this point. The Library would work with the selected vendor to supply what is needed.

65. Describe your requirements for converting active and historical data.

Response:

HRIS: Potential for data migration of any systems under the Scope of Work section of the RFP.

ERP: 3 year(s) of information from our general ledger, payroll, purchase orders and accounts payable modules migrated to the new system. Current capital assets and related depreciation migrated over as well.

66. What significant custom reporting requirements in your current systems must be brought over to the proposed system?

Response:

HRIS:

Standard EE0-1 reporting

Payroll Journals / Cash requirements

Census Data / Name, Position, Role, Compensation

ERP:

None

67. Has the Library identified any specific use cases for Prism

Response: No

68. What are your requirements in terms of budgets? We saw a requirement in relation to expense reports.

Response: We currently have 60 “sections“ that we need to allocate expense budgets for. We would like to allocate the expense budget by month (as some expenses get paid 1st part of the FY and some get paid last part of the FY). The report would list Annual Budget, YTD Allocation, YTD Actual and a Dollar and % Variance comparing YTD figures, also a comparison of YTD to Annual Budget. Some of the sections “roll up“ to a reporting unit and there is a need to accommodate that. Need the ability to show the number (say \$25,245 in supplies) and also the detail that makes up that number.

Would also like the ability to compare this YTD actual to last YTD and eventually a 3 or 5 year average.

Similar with revenue budget but only have 1 revenue budget to allocate, but will need same reporting capability.

Ideally the system would have a budget allocation worksheet that would show the last 3 FY actuals, the current year budget, Current YTD, Current Year Forecast, and Next year Budget, with Dollar and % variance comparing next year budget to current year budget and also to current year forecast. This would be for both revenue and expense.

69. How many expense reports do you file each month?

- a. How many items or transactions (invoices / bills / receipts) are included in each expense report?

Response: We normally have approximately 25 - 30 Reimbursement Forms submitted each month. They include anywhere from 0 - 5 attachments.

70. Please provide a benefits guide for your employees. If there is no benefits guide, please provide a list of the carriers that you work with and the benefits that they administer.

Response:

United Healthcare - Healthcare
Metlife - Dental and Vision.
Lincoln Financial - Disability and Life.
MissionSquare - 401/Retirement

Medcom - FSA

71. Please provide additional information regarding OCLD's "unique enrollment dates for multiple benefit plans"

Response: New Hire waiting period of 60 days, following the 1st of the month. Annual enrollment 2-3 week period in October.

72. How many retirees does OCLD have? Is this number in addition to the 533 active employees?

Response: We currently have 100 retirees that are separate from the 533 budgeted employees.

73. How do retirees pay for benefits?

Response: Retirees pay for benefits through a platform called Medcom

74. What type of compliance reporting is required?

Response:

- Hiring and recruitment
 - FLSA
 - EEO
 - Employee classification
 - Wage and hour compliance
 - Meal and break compliance
 - Overtime requirements
 - Employee benefits
 - ACA
 - Anti-discrimination and harassment policies
 - EEO
 - Employee privacy and data protection
 - Records retention
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75. Are OCLD's benefits aligned with a 1/1 plan year? If not, please indicate your plan year.

Response: Yes

76. Please provide more detail to functional requirement "Application allows users to create distribution lists for messaging based on HR and organizational properties".

Response: We would like the option to prompt the system to automatically send emails or messages to users upon log in, reminding them to act on self-service options. For example, it could notify users to use their PTO before it expires or alert new hires about open enrollment opportunities.

77. Please indicate if any third-party Integrations are needed for the new HRIS system

Response: This is possible, but it depends on how many of our current systems can be replaced by the selected HRIS.

78. In the RFQ section titled "The Contract" there is the following verbiage "... , require the selected VENDOR to indemnify and hold the LIBRARY harmless for actions and inactions by the VENDOR under the contract, ...". This is a very broad indemnification obligation with no cap on the amount of damages or the type of damages. Can you please provide more of a context around this?

Response: As an independent special district created by the Florida legislature, the Orange County Library District (the "District") operates from tax-payer dollars which must be protected when the District enters into an agreement with a contractor or vendor. The Florida Attorney General has opined that the District is prohibited by Florida law from indemnifying or limiting the liability of third-parties, such as contractors or vendors. The District's typical contract language for indemnification is as follows:

Contractor/vendor shall indemnify and hold harmless the OCLD, its officers, directors, and employees to the fullest extent permitted by law from and against all claims, damages, losses, liens, and expenses, (including but not limited to fees and charges of attorneys or other professionals and court and arbitration or other dispute resolution costs) to the extent caused by the negligence, recklessness, or intentional wrongful misconduct of contractor/vendor and persons employed or utilized by contractor/vendor in the performance of this Agreement.

Note: The indemnify and hold harmless clause applies to the eventual contract with the vendor, and is intended to protect the Library if the selected contractor/vendor is negligent.