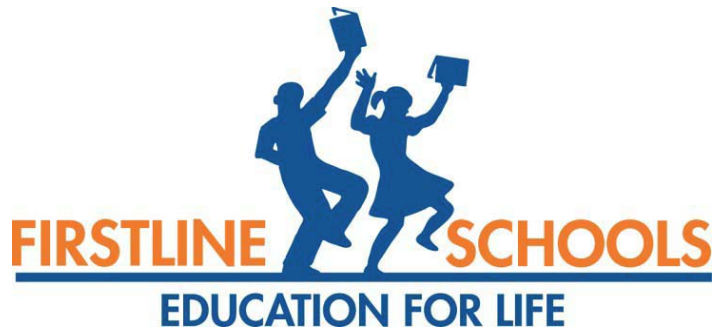


FirstLine Schools, Inc.
Request for Proposal – Human Resources Management System (HRMS)



FirstLine Schools, Inc.
Request for Proposal – Human Resources
Management System (HRMS)

RFP Announcement: Wednesday, October 30, 2018

RFP Questions Due: November 13, 2018 by 3:00 PM CST

Questions directed to:

Rebekah Cain, Executive Director of Operations
at rcain@firstlineschools.org

Proposal Submittal Deadline: November 26, 2018 by 3:00 PM CST

Rebekah Cain, Executive Director of Operations

300 N. Broad Street-Suite 207

New Orleans, LA 70119

Email: rcain@firstlineschools.org

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

Administrative and General Information

Background: The mission of FirstLine Schools is to create and inspire great public schools in New Orleans. We do this by directly operating non-selective public schools and by developing training programs for teachers and school leaders across New Orleans.

FirstLine Schools, Inc. (hereafter “FirstLine”) operates six (6) charter schools with approximately 3,500 students during the 2018-2019 school year. FirstLine also operates a central business office. Under this RFP, the awarded bidder(s) will provide a Human Resources Management Solution (HRMS).

Purpose: FirstLine seeks proposals from qualified respondents interested in providing a HRMS as described in this RFP.

The mission of FirstLine Schools is to create and inspire great open admissions public schools in New Orleans. As FirstLine Schools continues to grow, we must reassess the way we leverage technology, as our operations have traditionally been handled by systems that disparately each handle a particular feature of the HR life cycle. Our need for scalability, efficiency, mobility and flexibility demands that we streamline certain HR operations utilizing an integrated Human Resources Management System (HRMS). We are seeking an HRMS/HRIS platform that provides stable, core functionality to support the day-to-day functions of HR in the short term, and builds a strong foundation for advanced, strategic HRMS/HRIS functions in the long term.

- **Employees:** Approximately 450 employees, majority are full-time, salaried. FirstLine Schools also uses contractors.
- **Location:** Work locations are based in New Orleans, LA with one remote employee (currently in Florida).
- **Payroll provider:** Paychex. Timesheets are maintained in hard-copy and manually entered for payroll processing.
- **ATS and Time & Labor Systems:** FirstLine Schools currently utilizes Taleo to support receipt of candidate materials. The ATS is not currently used for reporting, candidate communication, and/or automated external job posting. Right Signature is used to support electronic signature for offer letters and new hire paperwork processing.
- **Benefits administration:** Various (Liazon, Discovery Benefits (COBRA Administration), Medical Benefits (BlueCross BlueShield via Liazon), Vision (BlueCross BlueShield via Liazon), 403B (TIAA), and Dental/STD and LTD (Mutual of Omaha via Liazon).
- **Financial System** – FirstLine Schools utilizes Blackbaud Financial Edge. The HRMS/HRIS system must integrate with Blackbaud (support from Prosper(s) to ensure for success integration is required) and we prefer HRMS/HRIS integrates with a wide variety of financial products should we elect to make a shift in the future.
- **Student Information Systems** – FirstLine Schools utilizes PowerSchool as a student information system.
- **System integrations** – Data integration points between systems are handled largely by manual data entry. Integration is currently not automated between the majority of the systems containing HR data.
- **System Users** – HR (administrator), Talent (administrator), Finance (administrator), Data (administrator), Supervisors (some administrators and users), Employees (user).

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

Project Goals: FirstLine Schools future HRMS environment is a system or set of systems that:

- Facilitates information flow within and between the HRMS and other systems through seamless integrations
- Streamlines workflows and business processes across the organization
- Supports knowledge transfer - Is a repository for employee history, roles & responsibilities
- Provides user-friendly, meaningful reporting
- Streamlines processes by enabling employees to manage aspects of their records and elections/enrollments through self-service
- Meets HR compliance requirements
- Customizable system that fits with our branding and has a multi format capability to capture files in various formats
- Captures data that facilitates strategic planning
- Provides transparency / visibility of data and processes across the organization
- Ensures confidentiality of employee data with robust role-based security
- Promotes consistency of business processes

While the Proposer's cost is of great importance, proposing the lowest price will not assure award of the service. FirstLine demands comprehensive, reliable, and efficient HRMS/HRIS platform. Failure to address FirstLine requirements or concerns with any matter will disqualify the Proposer from consideration.

FirstLine reserves the right to award service to a single provider or multiple providers based on the quality of the proposals.

Implementation Period: Commencement of work is targeted to begin on January 14, 2019 with the intent for a "go live" date with the exception of payroll-related module(s) as of April 1, 2019. Targeted "go live" date for payroll-related modules is July 1, 2019.

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

Proposal Authorities, Restrictions & Clauses

FirstLine Authorities and Options

- FirstLine reserves the right to reject any and all proposals for any reason.
- FirstLine reserves the right to correct or waive irregularities in submitted proposals should it be deemed in the best interest of FirstLine to do so.
- FirstLine reserves the right to negotiate any and all proposals for any reason.
- FirstLine reserves the right to award to more than one Proposer.
- FirstLine has 90 days to accept a submitted Proposal; the Proposer cannot withdraw a Proposal within that 90 day period without mutual consent with FirstLine.
- FirstLine reserves the right to require a performance bond; if such is required, the cost of that bond will be reimbursed to the Contractor by FirstLine.
- Final prices will be negotiated between the Proposer and FirstLine. FirstLine reserves the right to cancel the contract award if Proposer cannot commit to a contract that has prices within 5% of what is initially quoted.

Negative Assurances

- FirstLine cannot assure that the services will be awarded to any Proposer at any time.

Prohibitions

- FirstLine shall assess, negotiate and decide on this Proposal without influence from the Proposer's employees, the Proposer's representatives or agents, the Proposer's Proposers, or any other parties with a business, financial or family relationship to the Proposer.
- The Proposer is prohibited from exploiting a conflict of interest, gratuities, kickbacks, or any other type of incentive or influence upon FirstLine, its Board(s) and its agents; violators will be prosecuted to the extent of the laws pertinent to FirstLine.
- Proposers must submit a firm bid. A Proposer shall not stipulate in its proposal any conditions not contained in the contract documents. Any qualifying statements or conditions may be declared irregular and as not being responsive to the advertisement for bids.

Proposer Responsibilities

- It is the Proposer's duty to inspect all submitted documents to assure completeness, legibility, etc.
- It is the Proposer's duty to understand the RFP; any misunderstanding is the responsibility of the Proposer; FirstLine has no obligation to correct, reject or question any portion of the proposal.
- Proposer must abide by all RFP requirements; the proposal may be rejected by FirstLine regardless of the type or significance of noncompliance.

Termination of the Contract: The contract will naturally expire at the end of the contract term reviewed and agreed to between FirstLine and Prosper(s). FirstLine reserves the right to terminate the Contract with thirty (30) days advance written notice as a result of inferior quality of materials, product, workmanship, and/or reductions/termination of funding. FirstLine reserves the right to terminate the Contract immediately if there are unresolved safety or liability concerns.

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

Staffing: The Proposer agrees not to discriminate against any employee or applicant for employment because of race, sex, religion, color, age, disability, national origin or sexual orientation. The Proposer will ensure that all employees who take part in on-site meetings at any FirstLine work location follow FirstLine’s visitor policy and are not unsupervised around students at any time.

Confidentiality: Proposer and its employees will treat as confidential any non-public information that is provided by FirstLine at all times.

Assignments: The Proposer will not make any assignments or subcontract for the Work without written permission from FirstLine.

Legal: The Proposer must fulfill all obligations in compliance with all applicable laws and regulations, including the Occupational Health and Safety Act. The Proposer must notify FirstLine concerning any litigation involving the Proposer or its parent or subsidiary companies.

Responsibility and Control of Work: The Proposer will be responsible for all damage caused by its employees, its equipment or its supplies, the School’s property, equipment, buildings and building contents. The Proposer will also be responsible for all injuries to persons caused by its staff, equipment or supplies. The Proposer must be knowledgeable about and abide by all provisions of legislative enactments, State statute and local regulations in regard to safety.

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

Scope of Work

Technical

- Web-based software as a service (SaaS) HRMS system-solution, SAS 70 Type II (or similar) compliant.
- Integrated HRMS platform. In-suite integration operating on one central database strongly preferred.
- Need for solution to support organizational size of 500 employees with ability to support future growth.
- A proven set of integration APIs to enable real-time updating of data between external systems, such as benefits providers or Accounting and Budgeting software. APIs must be well documented and part of normal day to day support.
- System must be available 24 hours per day.
- System should, if possible, have a single-sign-on for all components.
- Must be able to assign employees to unique user security groups based on roles and modify user security group permissions.
- Must be able to provide an audit trail of changes made within the system.
- Must be able to provide an audit trail of user access to the system.
- Must have robust, easy to use “app” for end-users.

Services

- Implementation consulting – Because FirstLine Schools will be adopting an HRMS/HRIS for the first time with the need to integrate to existing applications, FirstLine Schools will look to the selected Proposer to guide the project team through careful planning of new business processes and workflows that represent current, best practices to maximize the benefit of adopting the HRMS/HRIS. HR and Talent team members will need to be trained by Proposer on all modules, less payroll. Members of Finance and Data departments that are administrators will need to be trained by Proposer on payroll, reporting, and timekeeping. Employees and supervisors may be trained by either Proposer or HR team members.
- Project management to ensure project timeline and deliverables are met.
- Migration of current employee and organization data to the HRMS System during system setup & configuration.
- Technical documentation – Any APIs or integration methods must be well-documented. Documentation must be provided prior to system launch.
- New system must run in parallel with current production system for at least one payroll.
- All available employee data must be uploaded into the system going back at least seven (7) years.
- User documentation - User-friendly, web-based user documentation is required.
- Detailed service level agreement outlining support hours, support resources, roles and responsibilities, and escalation paths.
- Detailed information about the customer support plan through implementation and going forward. Specific questions include: Will FirstLine have one main point of contact? A service team? Are there direct dial contact number(s)?

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

HRMS/HRIS Features

FirstLine Schools will require most, but not all, features typically offered in an HRMS/HRIS solution. See below chart for details:

| Feature | Description | Need | Priority Level (Tier 1 – Highest Priority) |
|-------------------------------|--|------|---|
| Expense Management | Reports and tracks that employee expense claims are processed, paid, and documented. | No | |
| Employee Data Capture | Records demographic information about employees including name (legal, maiden, preferred), address, salary, tax withholding elections etc. | Yes | Tier 1 |
| | Records fields specific to Educators, to include but not limited to, subject area, grade level, years of experience within Education, years of experience at FirstLine Schools, years of experience within subject area, and years of experience within grade level. | Yes | Tier 1 |
| | Ability to track background screening status required for active/terminated employees. | Yes | Tier 1 |
| | FirstLine Schools requires the need to track Educator certification. The ability to set and receive automatic reminders in advance of expiration dates is preferred. | Yes | Tier 1 |
| Payroll Processing | Processing payroll, to include all financial employee accruals, electronic pay statements, a general ledger solution, external pay data interface/data exchange, wage garnishment processing, new hire reporting, and customizable pay grid templates. | Yes | Tier 1 |
| | Need for HRMS Proposer to ensure continuity of payroll operations in the event of weather-related regional disruptions (e.g. hurricanes within the Louisiana regional area and/or within the base of payroll operations for HRMS). | Yes | Tier 1 |
| | ACA reporting capability integrated with payroll and benefit modules. | Yes | Tier 1 |
| | Ability to set-up alerts to flag overtime in order to require manager review and approval. | Yes | Tier 1 |
| Tax Pay | Processing and timely payment of all Federal, state and local withholding and unemployment taxes, including year-end processing and quarterly 941 reporting. | Yes | Tier 1 |
| Reporting Capabilities | Provides standard templates and custom options to pull data into meaningful reports (various formats including flat file and user-friendly dashboards) for both HR and business use. | Yes | Tier 1 |
| Workflow | Tasks can be configured to an authorization process that notifies individuals of outstanding authorization requirements | Yes | Tier 1 |
| Role-based Interfaces | Both employee and manager self-service options available to change or modify information, access relevant documents from a document library and generate reports. | Yes | Tier 1 |

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

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|--------------------------------|--|-----|--------|
| Time and Attendance | Documents employee labor hours and tracks attendance data (across multiple leave categories) for payroll purposes; automated accruals; manual time entry (as opposed to punches); directly code time to accounts; and approval workflows. | Yes | Tier 1 |
| | Supports the tracking of FMLA leave administration with integration across payroll and benefits modules. | Yes | Tier 1 |
| Talent Acquisition | Provides end-to-end support for the recruitment and hiring process, including external job posting and social media integration | Yes | Tier 1 |
| | Allows for workflows between Talent/HR/Multiple Hiring Managers; ability to upload candidate materials (including video content) and allows for HR/Talent to upload resume and create candidate profile (when resume is received as referral and/or from professional networks). | Yes | Tier 1 |
| | Ability to communicate with candidate from Talent Acquisition email; ability to track communication. | Yes | Tier 1 |
| | Robust, user-friendly reporting in support the building of talent pipelines; ability to search candidates based on resume screen related to specific qualifications and skill-sets. | Yes | Tier 1 |
| Absence Management | Measures and monitors employee absences to ensure maximum workforce productivity. | Yes | Tier 1 |
| Workforce Management | Forecasts workforce demand to aid in scheduling and determine needed headcount. | Yes | Tier 1 |
| | Ability to integrate position management and workforce planning with Blackbaud Financial Edge and comparable Financial Management Solution Systems to track positions by funding source (function/object codes). | Yes | Tier 1 |
| | Ability to integrate workforce planning with responses provided from FirstLine Schools' "Intent to Return" process (i.e. Educator input regarding plans to return to FirstLine as of following School Year), currently administered via Google Docs. | Yes | Tier 1 |
| Benefits Administration | Allows for employee self-service and integration with insurance carriers/benefit Proposers. | Yes | Tier 1 |
| Onboarding | Provides ability to collect new hire data (i.e. name, address, emergency contact, tax allowances, I-9 information) via online process for electronic completion, incorporates electronic signature, and provides reminders regarding outstanding paperwork. | Yes | Tier 1 |
| Employee Self-Service | Provides the ability for employees to view/download paystubs, leave balances, and to change information related to employee data (i.e. tax withholdings, address change). | Yes | Tier 1 |

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

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| | Need for employee self-service app to be user-friendly, easy to use/intuitive, and not cumbersome in process. Need for feature to allow for upload of required documents related to change request and for documentation of workflows by user. | Yes | Tier 1 |
| | Provides reminder notifications related to employee benefit election deadlines. | Yes | Tier 1 |
| Health & Safety | Ability to track workers compensation claim status and to track assigned safety managers per school site location. | Yes | Tier 1 |
| Tracking of Contractors and Partner Organizations | FirstLine Schools is interested in being able to track specific fields of information for <u>independent contractors</u> and individuals associated with school partner organizations (<u>not active employees</u>). Tracking is preferred as many contracts and partner organizations work daily in school sites (i.e. bus drivers, substitutes). It would be helpful to capture background screening status, school site assignment, and schedule. | Yes | Tier 1 |
| Employee Data Integration with PowerSchool Software | FirstLine Schools is interested in determining if employee data retained in an HRMS/HRIS related to subject area and grade level can be integrated with PowerSchool (student information system) to support school-based staff rosters and scheduling. | Yes | Tier 2 |
| Inventory Reporting | Ability to track issuance of company property (i.e. computer, phone, and tools) and create report(s) to track inventory. | Yes | Tier 2 |
| Organizational Charts | Ability to produce organizational charts by reporting structure, department, site location, and organization wide for organization with multiple unique job titles and multiple reporting structures. | Yes | Tier 2 |
| Succession Planning | Identifies and tracks development of personnel who demonstrate potential for increased responsibility. | Yes | Tier 2 |
| Performance Management | FirstLine Schools is interested in integrating data stored within Whetstone Education (performance management system) with Performance Management related fields within a HRMS/HRIS (to include, but not limited to, teacher effectiveness ratings, student learning targets, attainment of student learning targets). | Yes | Tier 2 |
| | FirstLine Schools is interested in ability to electronically store documentation created and stored within Whetstone within HRMS (e.g. written employee discipline documentation). | Yes | Tier 2 |
| Offboarding | Provides ability to create unique exit interview survey and track exit feedback for reporting. | Yes | Tier 2 |
| Electronic File Keeping | Provides storage space to maintain employee files, by employee, for record-keeping purposes and/or other organization documents for review. | Yes | Tier 2 |
| Learning and Development | FirstLine Schools is interested in tracking attendance and completion of required trainings but is not in need of a complete LMS system (i.e. sexual harassment training, bloodborne pathogen training, CPI training). | Yes | Tier 3 |

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

Ability to upload training certificate is desired.

Yes Tier 3

RFP Bid Process

Submission: The Proposer will submit the following by **Monday, November 26, 2018 at 3:00 P.M. CST.**

- One electronic copy of all documents (via email or USB device)

Submission should be delivered by email, mail or by hand to:

Ms. Rebekah Cain, Executive Director of Operations
FirstLine Schools
300 N. Broad Street, Suite 207
New Orleans, LA 70119
Email: rcain@firstlineschools.org

Proposals are expected to be comprehensive and include the information set forth in the response. Proposers also are invited to send any additional information or supplemental material they feel will aid FirstLine in properly evaluating their product offerings. Please be sure to respond to each of the elements requested in the *Proposal Requirements* section below and make your answers in direct response to the information being sought.

Failure by any Proposer to follow the specifications and requirements provided in this RFP may result in disqualification.

Any questions regarding this RFP should be directed to Rebekah Cain, Executive Director of Operations, at rcain@firstlineschools.org by November 13, 2018 at 3:00 P.M. CT. Responses to questions received will be uploaded to the RFP page of FirstLine’s website as of November 21, 2018 at 9:00 am CT.

Evaluation: A variety of weighted criteria, given below, will be considered in evaluating proposals. This evaluation will be made based on information provided within the Proposal, by the Proposer during RFP specific presentations or negotiations, client references, and industry references.

| Component | Scoring Scale | Evaluation Criteria |
|-------------------------|------------------------------|---|
| Proposal Quality | 0-50 points | Award of a purchase order or contract is based on the best value to FirstLine: quality, availability, delivery, specifications as outlined under the Scope of Work & Requirements section, terms, conditions, and fitness for the particular purpose. When a solicitation requires an oral presentation, submission of work samples, or product demonstration, these factors are part of the component evaluation. |
| | 0-30 points for each (Price, | Lowest bid(s) receive 30 points; Highest bid(s) receive 0 points; all other bids receive between 29 and 1 |

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

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| Price | Professional References & Company Financials) The highest score is 30 points; however, applicants failing to address a Component entirely will receive a score of zero. | points. The total cost may include unit price, implementation pricing, pricing of system customization needed to meet FirstLine’s mandatory requirements and objectives, and maintenance and cost of system as defined in the solicitation. If there is a discrepancy between a unit price and its extension, the unit price will prevail. |
| Professional References | | Relevant professional experience will be assessed to evaluate the Proposer’s stability, experience, and record of past performance in delivering the service to organizations with like size, operational, and system integration needs. |
| Company Financials | | Three years of most recent audited company financials are requested. The audited financial reports will be reviewed to determine if the company has the financial capacity to perform the work outlined in the contract. |
| Headquartered in Orleans Parish | 0-20 points each Applicant has provided verifiable evidence of component described by the Evaluation Criteria | Principal of Business and Registered Office in Orleans Parish as listed with the Louisiana Secretary of State. |
| State & Local Disadvantaged Business Enterprise | | A for-profit small business where socially and economically disadvantaged individuals own at least a 51% interest and also control management and daily business operations. As a certified DBE, a certificate issued by the City of New Orleans or other certifying agency must be provided with the submission. |
| Executive Resumes | 0-10 points for each | Consideration is also given to the applicants’ potential ability to perform successfully under the terms and conditions and their past performance record. |
| Community Involvement | Applicant can successfully demonstrate the Component as described by the Evaluation Criteria | Demonstrated organizational commitment to programs or public service initiatives serving the youth of New Orleans community relationships. |
| Innovation | | Proposal demonstrates innovative means and methods. |

FirstLine Schools, Inc.
Request for Proposal – Human Resources Management System (HRMS)

Projected Project Schedule & Due Dates

| Date | Event |
|------------------------------------|--|
| October 30, 2018 | Distribute RFP |
| November 13, 2018 by 3:00 PM CT | Proposer questions to FirstLine Schools due |
| November 21, 2018 by 9:00 AM CT | Responses to Proposer’s questions provided |
| November 26, 2018 by 3:00 PM CT | Proposals Due |
| November 27-30, 2018 | RFP reviews, selection of finalists for Proposer product demos |
| December 3-11, 2018 | Proposer Product Demos (via remote meeting) |
| December 12-18, 2018 | Decision/selection of HRMS/HRIS system |
| December 21, 2018 | Finalize selection decision |
| January 2-9, 2019 | Contract negotiations with selected Proposer |
| January 14, 2019 | Anticipated commencement of work Implementation date/go live date* |
| April 1, 2019 | Note: *Anticipate staggered roll-out of modules; anticipated payroll “go live” date of 7/1/19 (to be confirmed following selection of Proposer and implementation planning discussions). |

FirstLine Schools, Inc.
Request for Proposal – Human Resources Management System (HRMS)

Proposal Requirements

1. Executive Summary (2 pages maximum)
2. Company Overview/Fiscal Responsibility Summary
 - a. Experience in the education industry in New Orleans (Pre-K through College)
 - b. Cost-Containment Strategy
 - c. Organization Chart
 - d. Resumes of Key Contributors (bios will not be sufficient)
3. Performance History & Preparedness for FirstLine
 - a. Proposer's references (minimum 3) including company name, contact and phone number
Note: Non-profit and/or public K-12 organizations are preferred
4. Customer Service Proposal
 - a. Management/Supervision Structure
 - b. How the Proposer plans to monitor and measure service quality
 - c. Contingency/Coverage plan for expected and unexpected absences or staff turnover
 - d. Plan for maintaining responsiveness/communication with FirstLine leadership team(s)
 - e. Other methods for ensuring high-quality customer service
5. Response to Scope of Work (to include Technical, Services, HRMS/HRIS Features) – Outline and summary descriptions of features and services provided by the HRMS/HRIS with clear distinction of any features and services required and/or requested by FirstLine and not able to be provided by Proposer.
6. Implementation/Transition Plan
 - a. Proposed Implementation Timeline
 - b. Outline of training plan to support implementation process
7. Service Proposal – Pricing Sheet – Attachment A
8. Contact Information/Bid Authorization – Attachment B
9. Non Collusion Affidavit – Attachment C
10. Responsibility Disclosures – Attachment D
11. Checklist of Required Elements – Attachment E

FirstLine Schools, Inc.
Request for Proposal – Human Resources Management System (HRMS)

ATTACHMENT A
Page 1 of 1

PRICING AND SERVICE PROPOSAL

All Proposers must submit a cost breakdown for the implementation & maintenance of their product & services for FirstLine’s initiative as described in this RFP. The Proposer must agree to keep these prices valid for 120 days as of the closing date for this RFP. The Proposer must clarify any additional fees if customization is required in order to provide a requested feature as described in the RFP. Please complete the pricing summary for each category in the table outlined within the Scope of Work section of the RFP (copied below).

| Feature | Description | Fee |
|-------------------------------|---|-----|
| Expense Management | Reports and tracks that employee expense claims are processed, paid, and documented. | |
| Employee Data Capture | Records demographic information about employees including name (legal, maiden, preferred), address, salary, tax withholding elections etc. Records fields specific to Educators, to include but not limited to, subject area, grade level, years of experience within Education, years of experience at FirstLine Schools, years of experience within subject area, and years of experience within grade level. Ability to track background screening status required for active/terminated employees. | |
| Payroll Processing | FirstLine Schools requires the need to track Educator certification. The ability to set and receive automatic reminders in advance of expiration dates is preferred. Processing payroll, to include all financial employee accruals, electronic pay statements, a general ledger solution, external pay data interface/data exchange, wage garnishment processing, new hire reporting, and customizable pay grid templates. Need for HRMS Proposer to ensure continuity of payroll operations in the event of weather-related regional disruptions (e.g. hurricanes within the Louisiana regional area and/or within the base of payroll operations for HRMS). ACA reporting capability integrated with payroll and benefit modules. | |
| Tax Pay | Ability to set-up alerts to flag overtime in order to require manager review and approval. Processing and timely payment of all Federal, state and local withholding and unemployment taxes, including year-end processing and quarterly 941 reporting. | |
| Reporting Capabilities | Provides standard templates and custom options to pull data into meaningful reports (various formats including flat file and user-friendly dashboards) for both HR and business use. | |

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

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| Workflow | Tasks can be configured to an authorization process that notifies individuals of outstanding authorization requirements |
| Role-based Interfaces | Both employee and manager self-service options available to change or modify information, access relevant documents from a document library and generate reports. |
| Time and Attendance | Documents employee labor hours and tracks attendance data (across multiple leave categories) for payroll purposes; automated accruals; manual time entry (as opposed to punches); directly code time to accounts; and approval workflows. |
| | Supports the tracking of FMLA leave administration with integration across payroll and benefits modules. |
| Talent Acquisition | Provides end-to-end support for the recruitment and hiring process, including external job posting and social media integration |
| | Allows for workflows between Talent/HR/Multiple Hiring Managers; ability to upload candidate materials (including video content) and allows for HR/Talent to upload resume and create candidate profile (when resume is received as referral and/or from professional networks). |
| | Ability to communicate with candidate from Talent Acquisition email; ability to track communication. |
| | Robust, user-friendly reporting in support the building of talent pipelines; ability to search candidates based on resume screen related to specific qualifications and skill-sets. |
| Absence Management | Measures and monitors employee absences to ensure maximum workforce productivity. |
| Workforce Management | Forecasts workforce demand to aid in scheduling and determine needed headcount. |
| | Ability to integrate position management and workforce planning with Blackbaud Financial Edge and comparable Financial Management Solution Systems to track positions by funding source (function/object codes). |
| | Ability to integrate workforce planning with responses provided from FirstLine Schools’ “Intent to Return” process, currently administered via Google Docs. |
| Benefits Administration | Allows for employee self-service and integration with insurance carriers/benefit Proposers. |
| Onboarding | Provides ability to collect new hire data (i.e. name, address, emergency contact, tax allowances, I-9 information) via online process for electronic completion, incorporates electronic signature, and provides reminders regarding outstanding paperwork. |
| Employee Self-Service | Provides the ability for employees to view/download paystubs, leave balances, and to change information related to employee data (i.e. tax withholdings, address change). |
| | Need for employee self-service app to be user-friendly, easy to use/intuitive, and not cumbersome in process. Need for feature to allow for upload of |

FirstLine Schools, Inc.

Request for Proposal – Human Resources Management System (HRMS)

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| | <p>required documents related to change request and for documentation of workflows by user.</p> <p>Provides reminder notifications related to employee benefit election deadlines.</p> |
| Health & Safety | Ability to track workers compensation claim status and to track assigned safety managers per school site location. |
| Tracking of Contractors and Partner Organizations | FirstLine Schools is interested in being able to track specific fields of information for independent contractors and individuals associated with school partner organizations. Tracking is preferred as many contracts and partner organizations work daily in school sites (i.e. bus drivers, substitutes). It would be helpful to capture background screening status, school site assignment, and schedule. |
| Employee Data Integration with PowerSchool Software | FirstLine Schools is interested in determining if employee data retained in an HRMS related to subject area and grade level can be integrated with PowerSchool (student information system) to support school-based staff rosters and scheduling. |
| Inventory Reporting | Ability to track issuance of company property (i.e. computer, phone, and tools) and create report(s) to track inventory. |
| Organizational Charts | Ability to produce organizational charts by reporting structure, department, site location, and organization wide for organization with multiple unique job titles and multiple reporting structures. |
| Succession Planning | Identifies and tracks development of personnel who demonstrate potential for increased responsibility. |
| Performance Management | <p>FirstLine Schools is interested in integrating data stored within Whetstone Education and Compass (student information) systems with Performance Management related fields within a HRMS (to include, but not limited to, teacher effectiveness ratings, student learning targets, attainment of student learning targets).</p> <p>FirstLine Schools is interested in ability to electronically store documentation created and stored within Whetstone within HRMS (e.g. written employee discipline documentation).</p> |
| Offboarding | Provides ability to create unique exit interview survey and track exit feedback for reporting. |
| Electronic File Keeping | Provides storage space to maintain employee files, by employee, for record-keeping purposes and/or other organization documents for review. |
| Learning and Development | <p>FirstLine Schools is interested in tracking attendance and completion of required trainings but is not in need of a complete LMS system (i.e. sexual harassment training, bloodborne pathogen training, CPI training).</p> <p>Ability to upload training certificate is desired.</p> |
| Additional Fees | Proposer must outline any additional fees not incorporated within categories above. To include but not limited to: set-up/implementation fees, license fees associated with number of administrators and users, fees for customization, and/or average increase amount of administrative fees (if applicable). |

FirstLine Schools, Inc.
Request for Proposal – Human Resources Management System (HRMS)

ATTACHMENT B
Page 1 of 1

CONTACT INFORMATION/BID AUTHORIZATION

| | |
|--------------------------------------|--|
| Primary Contact Name | |
| Primary Contact Phone Number | |
| Primary Contact Email Address | |
| Company Legal Name | |
| Company Address | |
| Company Website | |

| | |
|--|--|
| Company Website | |
| Year Company Founded | |
| Years Operating in New Orleans | |
| Number of Clients | |
| Number of Employees | |
| Certified SLDBE (yes/no) If YES, Year Certified | |

| | |
|--|--|
| Authorized Representative Name | |
| Authorized Representative Signature | |
| Date of RFP Bid Submittal | |

FirstLine Schools, Inc.
Request for Proposal – Human Resources Management System (HRMS)

ATTACHMENT C

**Non-Collusion
AFFIDAVIT**

STATE OF _____

PARISH/COUNTY OF _____

BEFORE ME, the undersigned authority, personally came and appeared, _____, (Affiant) who after being duly sworn, deposed and said that he/she is the fully authorized _____ of _____ (Entity), the party who submitted a Proposal/Contract/Bid/RFP/SOQ No. _____, to FirstLine Schools.

Affiant further said:

- (1) That Affiant has not and will not employ any person, either directly or indirectly, to secure the public contract under which he/she is to receive payment, other than persons regularly employed by the Affiant whose services, in connection with the project or in securing the public contract, are in the regular course of their duties for the Affiant; and
- (2) That no part of the contract price was paid or will be paid to any person for soliciting the contract, other than the payment of normal compensation to persons regularly employed by the Affiant whose services with the project are in the regular course of their duties for the Affiant.

Signature of Affiant

SWORN TO AND SUBSCRIBED
BEFORE ME ON THIS _____ DAY OF
_____, 20____.

NOTARY PUBLIC

FirstLine Schools, Inc.
Request for Proposal – Human Resources Management System (HRMS)

ATTACHMENT D

Responsibility Disclosures

Responses to the following questions must accompany the contractor’s bid. A bid may be deemed non-responsive if the contractor fails to provide complete answers or provides false statements to any of the questions provided herein. If any change(s) occur(s) during the bidding process, updated responses must be provided within thirty (30) calendar days of such change(s).

1. Please indicate whether, within the past five (5) years, your firm has been the defendant in any type of court action(s) for (an) alleged violation(s) of labor or employment laws in connection with a contract for custodial services. Yes No

If yes, please explain the circumstances, including the specific allegation(s) filed against your firm; the name of the plaintiffs; the case number; and the disposition/current status of each case.

2. Please indicate whether, within the past five (5) years, your firm or any of its owners, partners, or officers, has/have ever been investigated, cited, assessed any penalties, or found to have violated any labor or employment laws. Yes No

If yes, please explain the circumstances, including the specific charge(s) filed against your firm, its owners, partners, and/or officers; the agency that was involved; and the disposition/current status of each case.

3. If a license is required for any of the services performed by your firm, please indicate whether, within the past five (5) years, your firm, or any individual employed by your firm, has been investigated, cited, assessed any penalties, subject to any disciplinary action by a licensing agency, or deemed to have violated any licensing laws. Yes No

If yes, please explain the circumstances, including the specific charge(s) filed against your firm; the licensing agency that was involved; and the disposition/current status of each case.

Signature of Legally Responsible Party

Date

FirstLine Schools, Inc.
Request for Proposal – Human Resources Management System (HRMS)

ATTACHMENT E
Page 1 of 1

CHECKLIST OF REQUIRED ELEMENTS

| ITEM | PAGE | INCLUDED (y/n) | INITIALS |
|---|-------------|---------------------------|-----------------|
| Executive Summary | | | |
| Company Overview/Fiscal Responsibilities Summary (including items “a” through “d”) | | | |
| Performance History & Preparedness for FirstLine | | | |
| Customer Service Proposal (including items “a” through “e”) | | | |
| Response to Scope of Work | | | |
| Implementation/Transition/Training Plan (including items “a” and “b”) | | | |
| Service Proposal – Pricing Sheet – Attachment A | | | |
| Contact Information/Bid Authorization – Attachment B | | | |
| Non-Collusion Affidavit – Attachment C | | | |
| Responsibility Disclosures – Attachment D | | | |
| Checklist (This Document) – Attachment E | | | |
| Electronic Copy | n/a | | |

END OF RFP