THE BRIEN CENTER

**Request for Proposal for
Unified HR & Payroll Software**

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RFP Introduction

Company Background

The Brien Center is CBHC, a provider of behavioral health and addiction services through outpatient, residential, community-based services that promote the recovery, independence, and quality of life of those served. They provide access and support to meet the behavioral needs of individuals of all ages, race, and cultures by working in partnership with state agencies, individuals, families, and other providers.

Confidentiality Statement

The information contained in this document is proprietary to The Brien Center. It is distributed to you for the sole purpose of providing information for your response to The Brien Center's Request for Proposal. As such, this document or any part thereof may not be reproduced or redistributed without written consent from The Brien Center.

Invitation to Bid

The Brien Center is searching for a strategic HCM and Payroll Software vendor offering a holistic solution to act as a single source of truth for managing all aspects of the employee lifecycle. We are searching for a vendor that understands our industry and has a commitment to continuous improvement through innovation, creativity, advanced technology, and strategic partnership with The Brien Center. In summary, The Brien Center is searching for a trusted, leading provider that will support and contribute to The Brien Center's effort to achieve operational efficiency, improve the employee experience, and ensure financial sustainability into the future.

You are being asked to provide a bid proposal for the requirements described in this RFP.

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Proposal Instructions

General Considerations

During the RFP response preparation period ending at 5:00 PM ET on 04/14/2025 no verbal/telephone requests for information will be accepted. You are encouraged to submit, via e-mail or by regular mail, questions, inquiries, and requests for clarifications to the contact named on the cover page.

The Brien Center RFP evaluation team composed of representatives from HR, Finance, Operations etc. will review all vendor bid proposals and collectively select the vendor(s) of choice.

Acceptance of Vendor Proposal

The Brien Center reserves the right to accept or reject any or all RFP bids, to take exception to the RFP specifications, or to waive any formalities. The Brien Center, at its sole discretion, may decide to take no procurement action as a result of the RFP and/or may re-bid all or portions of the RFP. The Brien Center reserves the right to award the RFP to other than the lowest priced vendor proposal based upon the Evaluation and Selection Criteria.

In the event of questions/answers, modifications, clarifications, or additions to the RFP become necessary as determined by The Brien Center, all vendors will receive, in writing, the revised addenda to the RFP. Once again please be reminded that all Vendor inquiries must be made in writing.

Proposal Preparation Costs

All costs incurred by the vendor(s) in the preparation and presentation of the proposal response, including costs for studies or designs, will be absorbed entirely by the vendor(s).

No Bid or Withdrawal

Vendors who receive the RFP and do not wish to bid should reply immediately with a letter of "No Bid", and an explanation. Additionally, if any vendor withdraws during any state of the RFP process, a similar letter should be sent. All documentation should be returned to The Brien Center or properly disposed of in the event of a "No Bid" response.

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Proposal Costs Submission

The Contract awarded will be at a firm and fixed price for the duration of the contract as agreed by both parties. The Vendor is responsible for clearly identifying and submitting, in their response, all costs required of The Brien Center.

Formal Vendor Proposal Presentations

The Selected vendors should be prepared to formally present and discuss their individual proposal packages to the The Brien Center's RFP evaluation team members according to RFP Schedule. This will provide the evaluation team with an opportunity to ask questions and seek clarification on any of the vendor responses to the RFP.

Proposal Submission

Vendor's proposal in response to this RFP will be incorporated into the final agreement between The Brien Center and the selected Vendor(s). The submitted proposals require the following sections in this order:

1. Executive Summary
2. Company Background Information
3. Vendor Questionnaire
4. Proposal Quote
5. Project Management Approach

Proposal Submission Due Date

Proposals should be received by the contacts named on the cover page by 5:00 PM ET on 04/18/2025. Proposals should be sent electronically.

Late Proposals

The Brien Center reserves the right to accept or reject without consideration any proposal that does not fully address the requirements of the RFP or arrives at the designated address and contact after the proposal due date and time identified. If portions of the response do not comply with any specifications, items or scope of the RFP, the Vendor should clearly highlight any such non-compliance for easy identification.

If the proposal response is at variance with the requirements of any item in the RFP, then the Vendor shall describe in detail, with full support data, the reasons why the proposal response still meets the requirements and not be considered an exception to the RFP or be treated as a partial response. Each proposal response classified as a variance statement should be clearly identified.

Altering Proposals

Proposals cannot be altered or amended after submission deadline. Any interlineation, alteration, or erasure made before opening time, must be initialed by the signer of the proposal, guaranteeing authenticity.

Withdrawal of Proposal

A proposal may not be withdrawn or cancelled by the bidder without permission of The Brien Center for ninety (90) days following the date designated for the receipt of the proposals, and the bidder so agrees upon submittal of their bid.

RFP Schedule

RFP Distributed:	04/02/2025
Intent to Bid Due Date:	04/07/2025
Deadline for Clarification Questions:	04/14/2025
Two-hour demos:	04/07/2025-04/18/2025
Vendor Proposal Due Date:	04/21/2025
Eight-hour on-site finalist demos:	05/01/2025-05/02/2025
Vendors Notified of Decision:	05/09/2025
Contracts Signed:	05/16/2025
Project Launched:	05/19/2025
Target Go Live Date:	07/1/2025

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Evaluation and Selection Criteria

Each Proposal received must adhere to the instructions, format/content, and specifications. This will ensure that evaluation criteria can be systematically applied to all Vendors. The major criteria categories for selection and evaluation are listed in priority order:

- Extent to which Vendor's proposed solution fulfills The Brien Center's stated requirements as set out in this RFP
- Ability of the proposed system to leverage Position Control as a unifying system foundation to increase visibility, ensure compliance, and maximize resources
- Level of configurability for unique organizational characteristics (compliance, labor costing, reporting, etc.)
- Knowledge of the Health and Human services industry and it's unique requirements
- Assessment of Vendor's ability to deliver indicated service in accordance with specifications set out in this RFP
- Proposed project plan for transition, implementation, and consultation of proposed solutions to fit The Brien Center business model
- Satisfactory completion of all required responses

Final Selection and Award

The Brien Center will notify each participating vendor of the selection/approval or rejection of all or a portion of their proposal. This decision will be the final decision for awarding services under the RFP. The Brien Center reserves the right to reject any, portions of, or all proposals without giving reason for the reject, and to award a contract or contracts to the bidder of their choice.

No selection/approval will be deemed final until the vendor(s) executes a contract with The Brien Center. The selection and contract negotiations will not be separate processes.

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Vendor Questionnaire

Company Overview

1. Identify your company name and headquarters, along with the name and headquarters of your parent corporation, if applicable. Provide address, main phone number, and website URL.
2. Provide a brief overview of your company and the history of your organization, including your mission statement.
3. What is the core product of your business?
4. What separates your product from your competition?
5. What are your major industry market areas? Describe the types of behavior health/medical services customers you service.
6. Is the proposed solution cloud-based?

HCM Product Functionality

Core HRIS

1. Describe how your solution acts as a unified solution for HCM and Payroll (Is the system a single database or a series of integrated modules?) Include the number of separate databases if applicable.
2. Does the solution have the ability to support employee self-service functionality so that employees can view and manage their own personal data, provide access to compensation and benefits data and provide updated balance and accrual details for time off policies? Please explain.
3. Describe how the software facilitates the maintenance of employee data and creation of employee history.
4. Is manager self-service functionality provided so that managers can easily view important metrics, address workflow items, view applicants, approve time sheets, and more?
5. Does the system support employee acknowledgments that can be electronically acknowledged, downloaded, and automatically stored in an electronic employee file?
6. Does the solution provide a compensation structure that can be defined by The Brien Center and is configurable?
7. The system must provide standard capabilities to model and report on organization, location, general ledger and reports-to structure. Is General Ledger integration with map functionality provided? Please explain.

8. Does your solution require multiple logins for different modules? Please explain how a user with multiple roles (Administrator, Manager, Employee) would access various parts of the system?
9. Is the system accessible via mobile for all employee and manager functionality including self-service, workflows, performance management, engagement, and more? Please explain.
10. Does the system maintain all employee information and historical data indefinitely? If not, how long is our data preserved before it is purged. Are there additional charges for data storage beyond a certain size or timeframe?

Position Control

1. Does the system use Position Control allowing position attributes such as allocations, organizational dimensions, reporting structure, job information, FLSA status, employment status, corporate level and productivity to be tracked by position versus by employee?
2. Is Position Control a unifying foundation of the platform or is it a separate module? Please explain.
3. Does the system support and create a visible and interactive organizational chart within the platform? If so, describe what information is visible and what actions can be performed? Is it unified with manager self-service?
4. Does the system allow for positions to be tied to specific organizational dimensions (program, location, cost center, etc.)?
5. Are positions tied to a specifically defined hierarchy, as displayed in the organizational chart?

Time & Attendance

1. Is the Time & Attendance system part of a unified HCM and Payroll system or a separate database? Please explain the integration method, if applicable.
2. Please describe the solution's capabilities to manage time off administration, self-service for time off requests and approvals.
3. Does the system support web time entry (no proprietary clocks)? If so, how is employee location verified when clocking in or out?
4. Does the system provide a mobile app that supports punching in and out, as well as submitting and approving timesheets?
5. Does the system have physical time clocks?
6. Does the system have the ability to set schedules for salaried employees?
7. Is there functionality to temporarily assign approval functionality in the case of the regular manager being out of office?

8. Can employees have more than one approver when working in more than one department?
9. Does the system include geo-fencing to ensure compliance with mobile punches? Is this an additional cost?
10. Does the system allow for the transfer between job codes or departments via web or mobile time entry?
11. Describe how the system supports the allocation of labor between departments for distribution of wages.
12. Can rate structures be set by role and department in addition to by employee?

Benefits Administration-To be added at a later date as a phase two project 2026

1. Is the Benefits Administration function part of a unified HCM and Payroll solution or a separate database? Please explain the integration method, if applicable.
2. Does the system allow for benefits analysis reporting? (By benefits group, benefit type, benefit plan, coverage type with employee and employer paid amounts, etc.)
3. Please describe the functionality provided for open enrollment (i.e. is it web based? Can employees utilize self-service to enroll, is the enrollment interface easy to use, etc.?)
4. Describe your system's ability to track and administer qualifying life events and available changes automatically.
5. Does the solution provide carrier integration to benefits providers, providing an automated process for sharing enrollment details from the system? How many carriers are support?
6. Are benefits administrators able to easily track, launch and manage enrollments across the organization, configure eligibility requirements and set up custom benefits plans for various groups of employees? Please explain.
7. Describe how your system provides employee benefit summary statements.
8. Explain how the system aids ACA Compliance. Are specialized monitoring tools and reporting functions included?

Payroll

1. Describe the proposed solution's payroll feature. Is it part of a unified HCM and Payroll solution or is it a separate database? Describe the required integration, if applicable.
2. Is the proposed payroll solution rules based? Please explain.
3. Does the solution support payroll preview analysis? (the ability to preview and audit payroll prior to processing)
4. Does the solution facilitate and manage garnishment processing?

5. Can the solution produce online pay statements and W2s?
6. Describe the process for producing manual and off-cycle checks.
7. Does the system process automatic tax filings and legislative updates? Please explain.
8. Can the system process supplemental payrolls at any time? Please explain.
9. Can the system handle middle of the week pay changes and prorated workweeks (32.5, 35, 38 hours, etc.)?
10. Describe how the system handles shift differentials.
11. Describe how the system handles secondary pay rates.
12. Describe how the system handles labor allocation.
13. Can the system produce labor allocation reports?
14. Describe how the proposed system handles employees with multiple rates of pay and department or cost center assignments. How would employees with multiple jobs or positions be handled?
15. Describe how your system recognizes overtime for employees who work across various divisions or companies within the same workweek.
16. Describe the integration between Benefits and Payroll. When a change is made to an employee's benefit election, how does the deduction amount get changed in Payroll?
17. Describe how your system will integrate with other systems, Relias for training, Intacct for accounting and Employee Navigator for benefits.
18. Does the system allow mass data updates like union raises?
19. Can the system automatically handle worked holidays?
20. Can the employee self-serve direct deposit changes?
21.

Recruiting Management

1. Describe the proposed solution's Recruiting Management capabilities in detail.
2. Does the system provide vacancy reporting for administrators and managers with the ability to calculate daily lost revenue for open positions?
3. Can authorized supervisors view the status of a vacancy and the potential candidates in real-time? Is this accessible from the organizational chart?
4. Once a position has been filled, is the position information transferred directly into the Human Resources process without having to re-enter the information?
5. Does the solution handle the offer management process, including offer letter and tracking of acceptance, negotiations, and declinations? Please explain.
6. Using the solution, can candidates electronically accept electronic offer letters?
7. Please explain the unification of data for Applicant Tracking and Core HRIS (unified database preferred. Please note if integrated)
8. Does the system support onboarding activities? Please explain.

9. Are applicant reports available to show, based on historical data, how many applicants are needed per hire for each position?
10. Does the system provide an on-line report writer tool that will produce custom reports as specified by a non-technical reporting administrator?
11. Does the system integrate with job websites like Indeed and LinkedIn?

Performance, Talent, Learning Management

1. Does the proposed solution include a performance management module? Is it part of a unified HCM and Payroll solution or is it a 3rd party application?
2. Describe how the system facilitates the performance management process (annual, 30-day, ad-hoc, etc.)
3. Does the system provide interactive elements on the form including comments for the employee and manager to view?
4. Can the system support goal setting and carry over to future check-ins/appraisals?
5. Can the system allow users to view performance history?
6. Does the system support the ability to rate and review competencies?
7. Does the performance solution support uploading and tracking of credential compliance information for education, skills, fitness, licenses, registrations?
8. Can the system track credential compliance and alert employees and managers when credentials are due to expire?
9. Can the system track disciplinary actions and outcomes?
10. Is there an area for employee engagement including surveys, announcements, awards and recognition and wellness programs?
11. License and certification tracking that includes notification when expiration dates are approaching.

Reporting/Workforce Analytics

1. Describe the proposed system's Workforce Analytics capabilities in detail.
2. Are there standard reports within the solution? If so, please list.
3. Does the system provide an ad-hoc report writer? If so, does it include all fields in the data dictionary?
4. Does the system provide dashboard analytics views for managers, administrators, and executives? Please explain.
5. Does the system produce budget reports to show variances as well as Budgeted vs. Actual and Budgeted vs. Assigned amounts?
6. Does the system provide point-in-time reporting? Please explain.
7. Does the system support multi-dimensional reporting by company, program, cost center, funding source, location, etc. as needed?

8. Does the system provide turnover analysis including turnover by date, length of service, supervisor, etc?
9. Does the system provide vacancy reports that include position and length of time the position has been vacant?
10. Will the system integrate with The Brien Center's internal data warehouse?

Tax Services

1. Describe the tax resources provided to your customers on tax regulations at the federal, state, and local levels? How do your customers access this information?
2. Do you provide full tax filing processes?
3. Do you provide ACA services?
4. Can employees self-serve W-2 changes?
5. Does your company provide annual W-2 print services?

Training & Support

1. Describe the proposed approach to training, the type of personnel to be trained, and the location.
2. Do you provide this training directly or through a third-party?
3. How can we configure the system to match our workflows? Can we make the changes ourselves or will we need to put in a request and wait for completion?

Implementation

1. Provide a high-level project timeline that describes how you see The Brien Center implementation of your solution proceeding. Include major milestones and key deliverables that will be generated during the project.
2. Are your implementation resources employees of your company or contract resources?
3. Does your solution support data from The Brien Center's HRIS? How will the data be migrated?
4. During the implementation process, do your consultants assist with process improvement and/or best practices? Please explain and provide examples.

Solution Technical Requirements

1. Is your solution developed internally, leased, or purchased from another provider?
2. If hosted by a 3rd party provider, who is the vendor?

3. Describe your maintenance and backup procedures including daily backups, retention timetable, and off-site backup storage approach. Where are your off-site backup facilities located?
4. Does your solution use role-based access? If yes, please describe the roles and permissions.
5. Describe the audit trail and historical activity tracking functionality.

Pricing & Terms

1. Please provide a cost proposal for the first three years of use detailing of costs The Brien Center would likely incur. These costs may include:

   - Software license fees
   - Hosting fees
   - Transaction fees
   - Implementation fees
   - Training fees
   - Documentation fees
   - Hardware costs