|  |
| --- |
| CITY OF SURPRISE  DEMONSTRATION GUIDE |
|  |

Table of Contents

**Section Page**

[Vendor Instructions 1](#_Toc196830220)

[Location Details 1](#_Toc196830221)

[Session Schedule 3](#_Toc196830222)

[Vendor Instructions 4](#_Toc196830223)

[City Participant Details 4](#_Toc196830224)

[Post Demonstration 5](#_Toc196830225)

[Demonstration Scenarios 6](#_Toc196830226)

[1. Company Overview 6](#_Toc196830227)

[2. HR and Personnel Management 7](#_Toc196830228)

[3. Applicant Tracking 10](#_Toc196830229)

[4. Benefits and Leave Administration 12](#_Toc196830230)

[5. Employee Relations and Risk Management 14](#_Toc196830231)

[6. Learning and Performance Management 16](#_Toc196830232)

[7. Time and Attendance and Scheduling 18](#_Toc196830233)

[8. Compensation Management and Payroll 20](#_Toc196830234)

[9. A Day in the Life 24](#_Toc196830235)

[10. Technical and Reporting 25](#_Toc196830236)

[System Integrator 27](#_Toc196830237)

[1. Company Overview 27](#_Toc196830238)

[2. Implementation Discussion 28](#_Toc196830239)

Vendor Demonstration Logistics

# Vendor Instructions

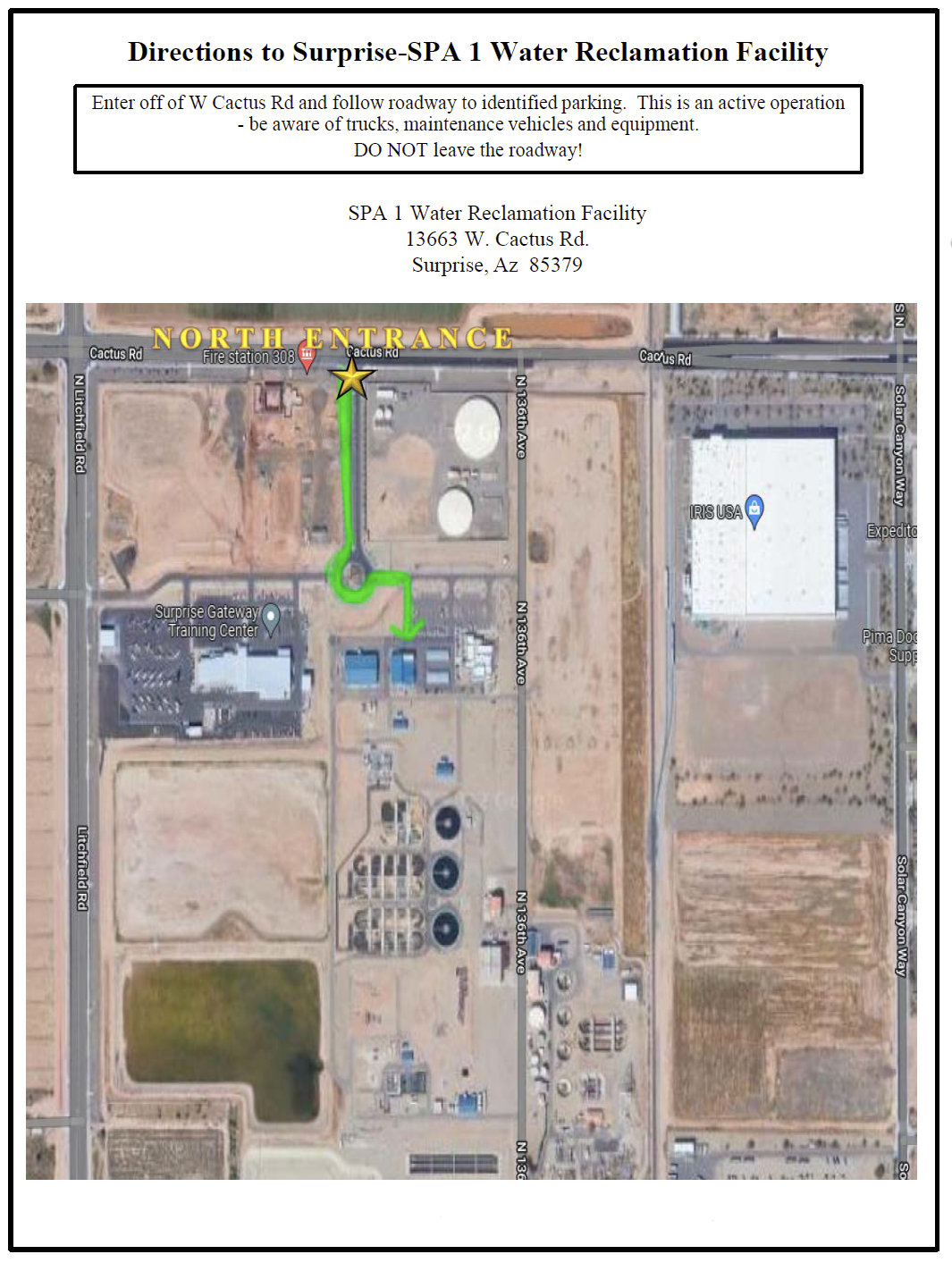
The City of Surprise, AZ (City), is pleased to invite your firm to participate in the vendor demonstration process related to the request for proposals (RFP) for Human Capital Management (HCM) software and implementation services. This document contains information related to demonstration logistics and detailed demonstration scenarios your firm will be expected to address through the process.

## Location Details

The demonstrations will occur at [SPA 1 Water Reclamation Facility 13663 W. Cactus Rd., Surprise, Az 85379](https://g.co/kgs/rK5wbGX). A map can be found on the following page.

The demonstrations will take place in the ***large training room*** located in the building to the far left of the parking lot (as you face the main administration building). Gates will open at 8:00 AM, and no badge is required for entry.

If you have any questions regarding building access on the day of the demonstration, please contact Stephanie Moore at (623) 222-7152, or reach out to the City’s Project Manager, Amber GradyFuller, at (623) 222-7519 or via email at [amber.gradyfuller@surpriseaz.gov](mailto:amber.gradyfuller@surpriseaz.gov).



## Session Schedule

| Day 1 (May 19th, May 21st, June 2nd and June 4th) | |
| --- | --- |
| **Time** | **Session** |
| 8:00 AM – 8:30 AM | Vendor Arrival and Preparation Time |
| 8:30 AM – 9:00 AM | Company Overview and Software Navigation |
| 9:00 AM – 10:15 AM | HR and Personnel Management + Workforce Planning |
| **10:15 AM – 10:30 AM** | **BREAK (15 Min)** |
| 10:30 AM – 11:45 AM | Applicant Tracking and Recruitment |
| **11:45 AM – 12:45 PM** | **LUNCH (60 Min)** |
| 12:45 PM – 1:45 PM | Benefit and Leave Administration |
| 1:45 PM – 2:30 PM | Employee Relations and Risk Management |
| **2:30 PM – 2:45 PM** | **BREAK (15 Min)** |
| 2:45 PM – 3:30 PM | Learning and Performance Management |
| 3:30 PM – 5:00 PM | Time and Attendance and Scheduling |

| Day 2 (May 20th, May 22nd, June 3rd and June 5th) | |
| --- | --- |
| **Time** | **Session** |
| 8:00 AM – 8:30 AM | Vendor Arrival and Preparation Time |
| 8:30 AM – 10:15 AM | Compensation Management and Payroll |
| **10:15 AM – 10:30 AM** | **BREAK (15 Min)** |
| 10:30 AM – 11:00 AM | A Day in the Life |
| 11:00 AM – 12:00 PM | Technical and Reporting |
| **12:00 PM – 1:00 PM** | **LUNCH (60 Min)** |
| 1:00 PM – 3:00 PM | System Integrator Discussions  **(Evaluation Team Only)** |

1st Floor Community Room

## Vendor Instructions

* Vendors are prohibited from starting screensharing earlier than the time listed on the schedule provided.
* Vendors will have the ability to have remote team members join.
* Session Recordings will not be allowed.
* Vendors must strictly adhere to the demonstration script provided. The session times and order will be enforced as shown.
* Vendors are instructed to clearly identify the demonstration scenario item they will be showing prior to demonstrating the functionality. City participants will follow along with participant guides that contain the scenarios. This will help City participants to best track scenario items shown.
* The City will attempt to hold substantive questions until the end of each session so that vendors may complete each demonstration step. Please reserve the last 5 – 10 minutes of each session for City questions. The City and vendor teams are permitted to ask clarifying questions throughout the presentations. Vendors are strongly encouraged to have knowledgeable staff available to actively answer questions as they arise.
* Within each section of the demonstration, vendors may adjust scenario items in the order that will allow “logical” navigation through the software; however, vendors should clearly indicate which demonstration scenario item is being addressed so that City participants can follow the demonstration process.
* As vendors go through the scenario items, the City requests that vendors discuss the recommended best practice to accomplish the required task/process. If the software has alternate approaches to achieving an outcome, please present the options as time permits.
* Within each functional area session, the City expects the vendor to provide a brief, end-to-end overview of the module capabilities.
* The City anticipates that each vendor will have a fully functioning version of the software running in the demonstration. The vendor should use the proposed version of the software listed in the RFP proposal response—not software in development or beta testing nor a newer/older version.

## City Participant Details

* City staff attendance will comprise the Evaluation Committee and department representatives. Different staff will attend various sessions based on their project role.
* The Evaluation Committee will evaluate vendor demonstrations based on the following scoring criteria.

**Demonstration Scoring Criteria**

| **Criteria** | **Description** | **Points** |
| --- | --- | --- |
| Functionality Demonstrated | This criterion considers information learned through proposer demonstrations including but not limited to the demonstrated user interface and the alignment of demonstrated functionality with preferred business processes. | 40 |
| Technical Capabilities | This criterion considers information learned through the Technical Discussion as part of proposer demonstrations as well as other sessions. | 15 |
| Approach Discussion | This criterion considers information learned through the Implementation Approach Discussion as part of proposer demonstrations as well as other sessions. | 25 |
| Experience Discussion | This criterion considers information learned through the Company Overview Discussion as part of proposer demonstrations as well as other sessions. | 20 |

* All City attendees will be invited to participate in Company Overview and Technical sessions. Participation in the individual functional area sessions will vary.
* BerryDunn, the City’s consulting partner, will participate in the demonstration process but is not a voting member of the Evaluation Committee.

## Post Demonstration

* Vendors must continue to direct all inquiries to the [Andrey Krasnovid](mailto:andrey.krasnovid@surpriseaz.gov) with the City of Surprise.

# Demonstration Scenarios

## Company Overview

|  |  |
| --- | --- |
| **Company Overview** | |
| **Session Description** | The City has scheduled the first **30 minutes** to provide a company overview. This is an unscripted session, where vendors are asked to provide an overview of their company. |
| **Target Audience** | This demonstration scenario is designed for all demonstration participants. |
| **Vendor Instructions** | This is an unscripted session, where vendors are asked to provide an overview of their company. Potential topics include:   * Very brief company history * Software products proposed * Markets/industries served * Representative clients * Key differentiators |

## HR and Personnel Management

|  |  |
| --- | --- |
|  | **HR and Personnel Management** |
| **Session Description** | The City has scheduled **75 minutes** to demonstrate how the system’s Human Resources and Personnel Management module supports the efficient administration of employee records, staffing management, position budgeting, and personnel tracking. |
| **Target Audience** | This demonstration scenario is designed for HR coordinators, department administrators, and personnel managers, and personnel budgeting/finance administrators within the City. |
| **Vendor Instructions** | The City requests the following items are demonstrated as part of this session.  ***Please refer to requirements outlined in the RFP document “Functional\_and\_Technical\_Requirements\_Capabilities”*** |

| **#** | **HR and Personnel Management** |
| --- | --- |
|  | Demonstrate how one central employee file is used throughout the system.   * Discuss how employees can interact with their employee profile via an Employee Self-Service (ESS). * Show how to maintain all employee file history (including pay, position, status). |
|  | Demonstrate the process of adding a new employee (including seasonal or contractors) and integrating with payroll.   * Show how information from the applicant tracking system flows to the employee master file. * Discuss assignment of the employee ID (automatic or manual) and how to assign City property (keys, computers, phones) to individual employees within the system for tracking purposes. * Show the ability to allow new hires to complete onboarding documentation via the ESS. |
|  | Demonstrate the ability to manage the I-9 verification process, including automated reminders for expiration. |
|  | Demonstrate the process of changing the status of an active employee or retired employee (e.g., deceased, terminated, or transferred to a new position). |
|  | Demonstrate the ability to assign an employee to two positions in two different departments. |
|  | Demonstrate HR-related self-service options available (and any supported mobile device). |
|  | Demonstrate the system’s ability to effective date (including future date) changes to positions, job codes, jobs, and other position-/job-related variables. |
|  | Demonstrate the ability to process personnel changes through the PA process. Please demonstrate the following:   * Show the ability to process position changes including transfers, promotions and rehires. * Show the ability to transfer an employee to a different department/division or payroll group without re-entering the entire employee file. * Show the ability to process compensation changes to base salary. |
|  | Demonstrate the ability to support decentralized personnel actions (PAs) process, whereby end users initiate PAs and workflow routes in the system, including updating the employee record. |
|  | Demonstrate the ability to track union contracts. |
|  | Demonstrate the employee termination/separation process, including related automation with benefits, dependents, final leave payouts, zeroing out leave balances, and exit interviews.   * Discuss tracking of City property in the possession of employees upon termination. |
|  | Demonstrate the ability to provide checklists for employee hire and termination process to ensure all steps are completed (checklist should include policy and agreement documents). |
|  | Demonstrate the ability to provide online view of employee's total compensation package including but not limited to: benefits, employee and employer contributions, base pay, add pay, accruals, FLSA status, and overtime. |
|  | Demonstrate the ability to provide the following reports:   * Date of hire * Years of service and years in current position * Active Employees * Turn-Over * Historical Reporting (e.g., employee pay and position at a point in time) * Ad hoc reporting tool * Equal Employment Opportunity (EEO) EEO-4 reports |
|  | The ability to conduct, monitor, and report on organizational engagement surveys. |
|  | Demonstrate available employee communication tools.   * Employee-preferred method of communication (email, text, app). * Communication targeting (segments of employees). * Communication options when employee does not have a City email. |
|  | Demonstrate the ability to create custom reports for defined end users using an internal report writer with appropriate security permissions. |
|  | Demonstrate the ability to export data from reports into standard applications (including Excel, CSV, PDF, HTML, other user-defined standard applications) for spreadsheet comparison, graphing, etc. |

|  |  |
| --- | --- |
| **#** | **Workforce Planning and Position Control** |
|  | Demonstrate the ability to integrate position, salary, and benefit data from the HR and payroll modules with the Budgeting module and enforce position control.   * Show the ability to add one and multiple new full-time equivalent (FTEs) for a current position and for a new position. * Show the ability to calculate cost for current, new, and transitioning employees and/or positions receiving additional pay (e.g., benefits, salary, working out of class, longevity, and additional special pays). * Show the ability to provide salary and benefit forecasting capabilities based on the import of real-time data from the payroll application/module. * Show how to calculate expected cost of new position based on position and bargaining unit. |
|  | Demonstrate the position control capabilities and how the software limits the ability to add unauthorized positions. |
|  | Demonstrate the ability to add multiple new positions at one time. |
|  | Demonstrate the ability to assign unique identifiers to a position. |
|  | Demonstrate the ability to track position history ( e.g., date filled/moved out of position). |
|  | Demonstrate the ability to perform electronic routing for approvals for new positions or changes to positions. |
|  | Demonstrate the ability to track grant-funded positions. |
|  | Demonstrate the ability to allocate funding for a position based on percentages and to change the funding for a position based on an effective date. |
|  | Demonstrate the ability to have multiple employees in a single position number and have the ability for multiple supervisors to approve the timesheets and reflect on the reporting structure. |
|  | Demonstrate the ability to assign multiple positions to an employee, including one primary and one or more secondary jobs. |
|  | Demonstrate the ability to allow employees to be paid from multiple positions in different funds, organizational units, classes, statuses, etc. |
|  | Demonstrate the ability to initiate mass changes (which may require workflow) on employee data based on MOU or other position changes that impact benefits and/or pay components associated with the position. |

## Applicant Tracking

|  |  |
| --- | --- |
| **Recruitment and** **Applicant Tracking** | |
| **Session Description** | The City has scheduled **75 minutes** to demonstrate the systems Applicant Tracking Module, focusing on its capabilities to streamline the recruitment process, manage job applications, and enhance hiring efficiency navigating the nuances of an educational institution. |
| **Target Audience** | This demonstration scenario is designed for Recruitment personnel, HR specialists, and hiring managers. |
| **Vendor Instructions** | The City requests the following items are demonstrated as part of this session.  ***Please refer to requirements outlined in the RFP document “Functional\_and\_Technical\_Requirements\_Capabilities”*** |

| **#** | **Recruitment and Applicant Tracking** |
| --- | --- |
| AT.1 | Demonstrate how job descriptions can be created, how/where they are stored, and how changes to job descriptions are tracked/maintained, including how mass changes are managed. |
| AT.2 | Demonstrate the process for creating positions in the system, including the following:   * Show how the system allows managers to create a requisition for recruitment and the ability to use workflow for approvals. * Show how a job posting is created. * Show how to fill multiple positions using one requisition. * Show how the system can handle internal postings (i.e., open to City employees only) versus external postings (i.e., open to all). * Show the job posting “Career Page” view and features for customization. * Show how job postings can be pushed to external job sites. * Show how to reset job requisitions upon calendar year-end. |
| AT.3 | Demonstrate the following application tracking processes:   * Show how the system handles applicant tracking and allows applicants to submit/attach documents with their application. * Show how the system performs Optical Character Recognition (OCR) on resumes to populate fields based on uploaded resumes. * Show how the system supports application submissions from external job boards, such as LinkedIn. * Show how to redact identifying information (name, date of birth, etc.) or user-defined criteria or fields from an application prior to submission to a hiring manager. * Show how the system moves applicants through the recruitment process, including initial screening (e.g., pre-screening based on minimum qualifications met). * Show how applicants are notified of their status. * Show how the system can restrict applicants from reapplying within a specific time frame. * Show how the system can send mass email communication templates to applicants. |
| AT.4 | Demonstrate the ability to access and submit an application through a mobile device (e.g., allow for resizing and formatting of the applicant screen if viewed on a mobile device such as cell phone or tablet). |
| AT.5 | Demonstrate the following hiring processes:   * Show how to schedule interviews, whether self-scheduling is available, and discuss any integration with Microsoft (MS) Outlook for scheduling. * Show how the system allows a user-defined weight for each screening event. * Show how to schedule applicants for pre-employment testing (e.g., physical ability exams, oral exams, polygraphs). * Show how to communicate with a candidate via the system regarding their application and status. * Show how to combine scores from different tests. * Show how to refer applications/resumes to hiring managers. * Show how the system can track interview notes. * Show how an offer letter can be generated. * Show how the system supports a new hire completing their onboarding paperwork, including benefit selections. * Show how the system can automatically close the requisition when the hiring process has been completed (i.e., if a 1-to-1 ratio between the requisition and the number of vacancies being filled). |
| AT.6 | Demonstrate how the system can generate a report indicating time spent between user-defined milestones, including requisition entry through new hire date. |
| AT.7 | Demonstrate the pre-built and ad hoc reporting features of applicant data, including a new hire list (e.g., new hires expected for orientation on a specific date), dashboard functionality for recruiters, etc. |

## Benefits and Leave Administration

|  |  |
| --- | --- |
| **Benefits and Leave Administration** | |
| **Session Description** | The City has scheduled **60 minutes** to demonstrate the system’s Benefits and Leave Administration module, highlighting the system’s capabilities for streamlining the management of employee benefits. |
| **Target Audience** | This demonstration scenario is designed for HR staff and benefits administrators within the City. |
| **Vendor Instructions** | The City requests the following items are demonstrated as part of this session.  ***Please refer to requirements outlined in the RFP document “Functional\_and\_Technical\_Requirements\_Capabilities”*** |

| **#** | **Benefits and Leave Administration** |
| --- | --- |
|  | Demonstrate the process of configuring and adding a new benefit and associating it with an employee or group of employees (e.g., bargaining unit agreements, job classification, etc.). |
|  | Demonstrate the ability to establish multiple eligibility rules and validate that an employee (and dependents) is eligible for the plan selected. |
|  | Demonstrate the ability to provide a benefits-specific new employee orientation checklist that can be customized by user-defined rules with appropriate security permissions. |
|  | Demonstrate the ability to provide a benefits enrollment portal to accommodate open enrollment, address changes, and new hire enrollment processes and generate summary statements by employee and employer contributions. |
|  | Demonstrate the ability for employees to elect benefits outside of open enrollment with provided proof of a qualifying event and upload documentation as proof to the system. |
|  | Demonstrate the ability to automatically produce payroll deductions based on benefit plan enrollments, retroactively enroll dependents in plans, and automatically impact payroll to compute the proper pay adjustments and deductions. |
|  | Demonstrate the ability to have two years open for benefit enrollments and closeouts for administrative functions. |
|  | Demonstrate the ability to adjust payroll deductions for benefits in mass to turn on/off employee or employer deductions for a period. |
|  | Demonstrate the ability to configure leave accruals according to employee type or group based on years of service. |
|  | Demonstrate the process for calculating and collecting employee deductions in arrears. Include the following:   * Show how to produce a billing notice for employees on leave of absence. * Show how employee repayments are processed through payroll. * Show how to transfer benefit arrears balances to accounts receivable. |
|  | Demonstrate the ability to generate annual enrollment notification letters and send them to COBRA individuals based on benefit enrollment data. |
|  | Demonstrate how the system supports the generation, review, and secure transmission of 834 files (Benefit Enrollment and Maintenance files) to insurance carriers, including the ability to configure transmission methods as SFTP. |
|  | Demonstrate Affordable Care Act (ACA) tracking functionality. |
|  | Demonstrate the ability to create Form 1095-C and 1095-B for transmittal to the IRS, as well as the 1095 forms to be sent to employees and retirees. |
|  | Demonstrate the ability to produce a warning/error report of employees with no benefit deductions due to low or no paycheck prior to running payroll. |
|  | Demonstrate the ability to track relevant FMLA, workers compensation, military leave, and other City-defined leave of absence information by employee. |
|  | Demonstrate the ability to track leave used and leave available based on variables including but not limited to hire date, length of service, and hours previously taken. Include the following:   * The ability to set up accruals based on hire date and service length, including vacation rollover limits (e.g., 560 hours) * The ability to automatically apply increased accrual rates after service milestones (e.g., 6 hours after 1 year) * The ability to project future accruals during time-off requests and factor them into approval * The ability to prevent leave overuse and ensure accurate payroll without manual corrections     **Scenario Example:** An employee hired on June 12, 2024, accrues vacation immediately at 4 hours per pay period, with the rate increasing to 6 hours after one year of service. On June 10, 2025, the employee requests 40 hours of vacation to cover June 10–17, a period that crosses their one-year anniversary on June 12. The system should apply tiered accrual rates based on the service milestone and approve the request only if total available and projected accruals cover the full amount. |
|  | Demonstrate how the system supports the configuration and enforcement of leave accrual policies, including waiting periods, and accurately tracks leave usage and availability based on factors such as hire date, service length, and hours previously taken. Include the following:   * The ability for frontloaded hours to be tracked separately and become available based on eligibility rules * The ability to set visibility controls (e.g., accrual shown but not usable until eligible) * The ability to generate real-time messaging or alerts to guide employees and supervisors for eligibility rules   **Leave Policy Highlights:** The employee receives 40 hours of sick leave frontloaded upon hire but is not eligible to use the time until completing 90 days of employment. |
|  | Demonstrate the ability to provide a set of qualifying questions for leave requests that collects information necessary to determine if the leave can be approved under any qualified leave program (e.g., FMLA, PFIL, Military). |

## Employee Relations and Risk Management

|  |  |
| --- | --- |
| **Employee Relations** | |
| **Session Description** | The City has scheduled **45 minutes** to demonstrate how the system’s Employee Relations module supports efficient management of employee relation records and compliance. The session will also include a demonstration of how the system’s Risk Management module supports efficient management of Risk records and compliance. |
| **Target Audience** | This demonstration scenario is designed for HR personnel within the City. |
| **Vendor Instructions** | The City requests the following items are demonstrated as part of this session.  ***Please refer to requirements outlined in the RFP document “Functional\_and\_Technical\_Requirements\_Capabilities”*** |

| **#** | **Employee Relations** |
| --- | --- |
| ER.1 | Demonstrate the system’s ability to record and track various employee-related issues (e.g., disciplinary actions, counseling, grievances, performance improvement plans) in an HR-maintained activity log. |
| ER.2 | Demonstrate the ability to record and track disciplinary actions (and maintain history), including information on incidents causing the actions, steps taken in resolution, and the personnel involved (captured by employee), with Secure File Transfer Protocols (SFTP). |
| ER.3 | Demonstrate the ability to capture user-entered narrative for each step of the disciplinary process with appropriate security permissions. |
| ER.4 | Demonstrate the system’s ability to tie employee relations cases to the employee master file. |
| ER.5 | Demonstrate the ability to allow a supervisor to view prior disciplinary action with appropriate security permissions. |
| ER.6 | Demonstrate the ability to restrict a former/previous supervisor to view employee disciplinary action upon transfer/other move to a new supervisor. |
| ER.7 | Demonstrate the ability to allow employees to complete online entry of a grievance, with the ability to select the personnel policy being grieved from a list. |
| ER.8 | Demonstrate the ability to record and track a multistep grievance process through multiple iterations. |
| ER.9 | Demonstrate the ability to track and notify the labor relations manager and/or other user-defined staff members when a grievance has been granted. |
| ER.10 | Demonstrate the system’s ability to provide a user-friendly ad hoc reporting tool. |
| ER.11 | Demonstrate the system’s ability to generate the following reports with the appropriate security permissions:   * Number of employees on a performance improvement plan. * Corrective/disciplinary action history by reason and date (e.g., Performance, Attendance, Other district defined) * Grievance activity by bargaining unit, division, and department. * Protected classifications * Employee demographic information (e.g., hire date, wage rate, seniority date, division, classification title) by bargaining unit. |

| **#** | **Risk Management** |
| --- | --- |
|  | Demonstrate the risk management module at a high level and discuss how it interacts with all other proposed system modules. |
|  | Demonstrate the ability to decentralized data entry to enable employees and managers from different city departments to input risk-related incidents or claims from various locations. |
|  | Demonstrate the system’s ability to allow authorized users to trigger Family Medical Leave Act (FMLA) tracking based on initiation of workers’ compensation leave (for qualifying injury/illness). |
|  | Demonstrate the ability to track services performed for a specific claim. |
|  | Demonstrate the ability to track mitigation plans, assigning tasks and deadlines to relevant HR or legal personnel. |
|  | Demonstrate the system’s ability to track all payments made related to a claim (including medical, expense, indemnity, subrogation, excess recovery). |
|  | Demonstrate the ability to track insurance coverage expiration dates. |
|  | Demonstrate the ability to track motor vehicle accidents (MVA) and outcomes. |
|  | Demonstrate the ability to retrieve disciplinary actions to identify trends in insurance claims. |
|  | Demonstrate the ability to track violation of specific safety requirements (VSSR). |
|  | Demonstrate the system’s ability to support safety audits of facilities. |
|  | Demonstrate the ability to generate all risk management reporting required to meet external mandates (including city/local, state, and federal). These should include the generation of all reports and forms that comply with EEOC, OSHA, Department of Labor, military status, and FLSA standards and regulations. |
|  | Demonstrate how the system supports the secure transmission of risk management reports using SFTP. The demonstration should show how reports—such as those required for EEOC, OSHA, Department of Labor, and other compliance mandates—are securely generated and transmitted to external entities, ensuring data privacy and regulatory compliance. |

## Learning and Performance Management

|  |  |
| --- | --- |
| **Learning Management and Performance Management** | |
| **Session Description** | The City has scheduled **45 minutes** to demonstrate how the system’s Learning and Performance Management modules can enhance employee development, track performance, and streamline training processes. |
| **Target Audience** | This demonstration scenario is designed for HR personnel, personnel managers, and training coordinators within the City. |
| **Vendor Instructions** | The City requests the following items are demonstrated as part of this session.  ***Please refer to requirements outlined in the RFP document “Functional\_and\_Technical\_Requirements\_Capabilities”*** |

| **#** | **Learning Management and Performance Management** |
| --- | --- |
|  | Demonstrate the ability to record and update employee training data. |
|  | Demonstrate the ability to allow content development through built-in development tools and templates for creating text, graphic, interactive elements, and standards-based output (SCORM, AICC). |
|  | Demonstrate the system’s ability to provide courses with learning resources (e.g., participant guide, glossary, etc.). |
|  | Demonstrate the ability to support classroom management (creating classrooms and assigning courses, assigning instructors if applicable, locations, and resources). |
|  | Demonstrate the ability to track dates of licensure, certification, training, permits, and other expirations.   * Show how the system supports notifications of expiring licenses to employees and supervisors. * Show how to verify if an employee attended training (push notification to employee to confirm attendance). |
|  | Demonstrate the ability to assign certification and mandatory training to employees and notify supervisor and employee of a need for certification/training through workflow notifications. |
|  | Demonstrate the ability to initiate notifications (with the ability to define who receives notification) when employees have successfully completed training/certification linked to conditions of employment (e.g., incentive certifications, water license, police certifications). |
|  | Discuss/show any prebuilt training material that comes with the system.   * Discuss how frequently training is updated. * Discuss whether it can be customized. |
|  | Demonstrate the ability to import or integrate custom e-learning courses and learning content directly in the system, including the ability to track participation through the system. |
|  | Demonstrate the ability to group courses and learning content in a learning track and assign courses to multiple groups that can be defined based on department, role, job titles, etc. |
|  | Demonstrate the ability to create a survey question bank. |
|  | Demonstrate the system’s ad hoc reporting tool for this module (e.g., total hours and cost per training). |
|  | Demonstrate the ability to create a performance evaluation template (various types of templates such as manager, supervisor, or other).   * Show how a supervisor uses the system to evaluate an employee. * Show how to assign an evaluation to another team member, * Show how to assign a self-evaluation to an employee. * Show how to weight each evaluator’s score. |
|  | Demonstrate the ability to integrate employee performance review documentation with employee development information (including employee work goals). |
|  | Demonstrate the ability to accommodate review schedules and notify employees and supervisors of evaluation due dates. |
|  | Demonstrate the ability to conduct self-, peer- or “360" evaluations. |
|  | Demonstrate the ability to link merit allocations based on guidelines/rules tied to the performance evaluation rating. |
|  | Demonstrate the ability for the finalization of a performance review to automatically generate a Personnel Action. (e.g., probationary period end). |

## Time and Attendance and Scheduling

|  |  |
| --- | --- |
| **Time and Attendance** | |
| **Session Description** | The City has scheduled **90 minutes** to demonstrate how the system’s Time and Attendance module enhances the management of employee time tracking, attendance, leave management, and payroll processing. The session will also include a demonstration of the Scheduling module, highlighting how it enhances workforce scheduling and supports streamlined staff management. |
| **Target Audience** | This demonstration scenario is designed for HR personnel, payroll coordinators, personnel managers within the City. |
| **Vendor Instructions** | The City requests the following items are demonstrated as part of this session.  ***Please refer to requirements outlined in the RFP document “Functional\_and\_Technical\_Requirements\_Capabilities”*** |

| **#** | **Time and Attendance** |
| --- | --- |
| TA.1 | Demonstrate the methods available for time entry, including web and mobile capabilities. Discuss whether time entry can be accessed in specific locations (e.g., can only enter time when at work site) and whether training tools will be available to payroll clerks. Describe how the system attaches documentation from the employee. |
| TA.2 | Demonstrate the ability to separate exception-based and non-exception-based time entry to accommodate varying employee types at the City. Discuss whether there is a time donation feature. |
| TA.3 | Demonstrate the ability to designate a backup for employees who are unable to enter or approve their time (e.g., due to sick leave). |
| TA.4 | Demonstrate the ability to support 14 day FLSA calculations. |
| TA.5 | Describe how the system addresses second- and third-shift clock-ins and if it can be set to carry on the shift benefit if the clock-out time has passed the start time for the next shift. Discuss the system’s programming ability for callout rules. |
| TA.6 | Demonstrate the system’s ability to request and track multiple leave types, including FMLA and injury leave. The demonstration should show how the system:   * Calculates FMLA eligibility and balances based on hire date, length of service, and previously used hours * Tracks leave taken and remaining balances across different leave types * Supports the submission and approval process for each leave type |
| TA.7 | Demonstrate the system’s ability to display and manage employee leave requests, including how they integrate with time entry. Specific examples to review include:   * Calendar and Reporting Views: Show how users and managers can view leave requests in a calendar format and how this data flows into time entry and payroll. * Comp Time Tracking: Explain how the system tracks compensatory time earned, and used. * Unique Role Configurations (e.g., Mayor or Executive Staff): Demonstrate how the system handles time tracking for executive roles—can certain roles (like the Mayor) have separate vacation categories or be grouped with general accruals? * Time-Off Scheduling Rules: Show whether the system can enforce business rules, such as:   + Prioritizing time-off approvals based on seniority   + Custom blackout periods or department-specific restrictions |
| TA.8 | Demonstrate the ability to automatically calculate overtime based on hours worked and specific union/employee type. Discuss whether the system can be set for holiday shift rules. |
| TA.10 | Demonstrate the ability to charge time into project accounting on a fixed percentage, percentage of an hour, fixed dollar, and allocation formula to each project grant. |
| TA.11 | Demonstrate how to handle a timecard correction for a prior period and how missed timecard punches are managed. |
| TA.12 | Demonstrate a real-time dashboard to view and manage time worked, overtime, and absenteeism. |
| TA.13 | Demonstrate the ability to produce audit reports on time entry. |

| **#** | **Scheduling** |
| --- | --- |
|  | Discuss the integration ability of the scheduling module with the time/attendance module. |
|  | Demonstrate the ability to maintain the following tables for schedule creation:   * Shift * Rotation (number of days on and off) * Work assignments * Mandatory or non-mandatory fill position indicator |
|  | Demonstrate the ability to accommodate the creation of schedule templates and copying of previous schedules. |
|  | Demonstrate the ability to maintain at least 50 different shift configurations in the table of defined shifts. |
|  | Demonstrate the ability to define variances (both positive and negative) between required number of personnel and actual scheduled for a given position on a given day. |
|  | Demonstrate the ability to automatically contact employees via telephone, email, text messaging, and web to offer an assignment (e.g., overtime availability, open shifts) and update the real-time roster. |
|  | Demonstrate the ability to support the shift bid and time-off bid process for certain eligible groups of employees. |
|  | Discuss the ability to preserve the schedule in the event the system is unavailable due to planned or unplanned downtime. |
|  | Demonstrate the ability to define workload restrictions by position. These could include number of hours between shifts, maximum hours worked per regular shift, maximum overtime hours per time period. |
|  | Demonstrate the ability to support varying types of scheduled weeks, including 48-, 60-, and 72-hour weeks for public safety. |

## Compensation Management and Payroll

|  |  |
| --- | --- |
| **Compensation Management** | |
| **Session Description** | The City has scheduled **105 minutes** to demonstrate the system’s Compensation and Payroll Administration, highlighting the system’s capabilities for streamlining the management of employee compensation, and the management of employee payroll, from timekeeping to paycheck distribution. |
| **Target Audience** | This demonstration scenario is designed for HR and Payroll staff and compensation administrators within the City. |
| **Vendor Instructions** | The City requests the following items are demonstrated as part of this session.  ***Please refer to requirements outlined in the RFP document “Functional\_and\_Technical\_Requirements\_Capabilities”*** |

| **#** | **Compensation Management** |
| --- | --- |
|  | Demonstrate the system’s ability to manage and modify pay tables without impacting unrelated data. Specific examples include:   * Editing a specific section of a pay scale (e.g., just one step or classification) * Applying the change to relevant employee records automatically * Tracking audit history of pay table updates |
|  | Demonstrate the system’s ability to process mass compensation changes based on user-defined criteria. Specific examples to review include:   * Applying department-wide or bargaining unit increases * Performing mass updates based on performance review results * Executing increases by percentage or flat dollar amount * Applying mass step increases for eligible classifications * Ability to exclude employees or employee groups from the process |
|  | Demonstrate how the system manages earnings codes, overtime, and special pay. Specific examples to review include:   * Calculating multiple overtime types (e.g., straight time, time-and-a-half) * Handling blended OT rates across earnings types * Configuring and scheduling earnings codes (e.g., incentive pay, uniform allowance, shift differentials) * Assigning earnings by job class, department, or exemption status |
|  | Demonstrate how the system manages compensation notifications and approval workflows. Specific examples to review include:   * Sending automated alerts to HR reps when a pay increase is processed * Requiring approval steps for pay changes tied to compensation rules * Showing workflow history and audit logs tied to compensation events |
|  | Demonstrate the system’s ability to define compensation payout rules and earnings treatment for statutory and retirement purposes. Specific examples to review include:   * Creating multiple payout rules by department or job class * Defining earnings as contributable to pension, FICA, Medicare, or other accumulators |
|  | Demonstrate the system’s ability to accumulate, store, and maintain creditable service by employee in to calculate the amount of an annual longevity/stability payment.   * Calculating multiple longevity tiers (e.g., 5, 10, 15 years) * Recognizing breaks in service while maintaining total eligible years |
|  | Demonstrate the system’s ability to manage deductions and employer/employee tax contributions. Specific examples to review include:   * Automatically ending deductions when balance is paid in full * Calculating and storing contributions to Federal, state, city taxes, and retirement * Reporting earnings, deductions, and Medicare totals by calendar or policy year |
|  | Demonstrate the system’s ability to calculate and apply retroactive pay. Specific examples to review include:   * Processing retroactive compensation for up to two years * Automatically calculating owed amounts and assigning appropriate earnings codes * Integrating back pay into payroll runs and audit logs |

| **#** | **Payroll** |
| --- | --- |
|  | Demonstrate the ability to allow continuous updating of employee personnel and job records without interfering with payroll processing. |
|  | Demonstrate the system’s ability to calculate salary employee effective date step increases as a result of action changes (e.g., promotions, demotions, acting appointments, and other actions). |
|  | Demonstrate how the system handles payroll when an employee changes positions or changes pay rate mid-pay period. |
|  | Demonstrate the ability to calculate pay for multiple positions for one employee that transfers during a pay period (which results in a change in earning codes). |
|  | Demonstrate the ability to manage and process payroll for multiple pay groups, frequencies, and employee types within a single system.   * Include hourly and salaried * Process weekly, bi-weekly, and special payrolls concurrently |
|  | Demonstrate the ability to configure the prioritization of garnishments and support orders based on legal requirements, including the following:   * Bankruptcies * Fixed amounts * IRS levies * Multiple child support orders * Student loans |
|  | Demonstrate the ability to provide pay period calculation of garnishment(s) and support amounts each period based on employee disposable earnings and garnishment rules (priority of garnishments, proration percentage, etc.). |
|  | Demonstrate how the system calculates and deducts retroactive deductions at historical rates.   * Show how deductions are tied to retro pay using the original benefit and tax rates in effect when the pay was earned * Display how the system tracks these deductions and manages any resulting arrears balances |
|  | Demonstrate the system’s ability to establish benefit arrears repayment plans. |
|  | Demonstrate all payroll processing steps from a centralized standpoint, from generating time and other payroll data to checks being printed (including retroactive pay adjustments, monthly pension adjustment calculations, final pay, and general ledger [GL] reconciliation).   * Demonstrate how to reverse/undo a payroll if necessary. Discuss if the system can accommodate supplemental checks, including special pay. * Describe the void process for checks and direct deposits. * Show how to print a check on a blank sheet so that print includes watermarks, security features, and signatures. * Show how to calculate and pay final pays. * Show how to calculate and pay retroactive pays. |
|  | Demonstrate the ability for payroll administrators to simulate payroll runs, including gross-to-net calculations, before finalizing the pay run.   * Allow simulation of changes to earnings, deductions, and tax impacts   Show payroll preview features before posting final payroll |
|  | Demonstrate how the system tracks reimbursement expenses for salary and benefits linked to a grant. |
|  | Demonstrate how the system ensures compliance with allowable expenditures within payroll by accurately tracking salary and benefit costs. |
|  | Demonstrate the employee self-service options available related to payroll, including the following:   * View and modify tax withholding information. * View current and prior pay stubs. * View and download W-2s. * Initiate and view leave requests and balances. * View and modify direct deposit information. * Run what-if scenarios (e.g., “If I change tax elections, what will my net pay be?”). * Explain how tax changes are implemented.   Explain the storage of these items, their visibility, and the process to verify an employee’s information for accuracy. |
|  | Demonstrate the ability to integrate the payroll application with the Financial System’s GL to make payroll journal entries. |
|  | Demonstrate the system’s ability to generate and transmit payroll journal entries to the City’s existing ERP/financial system. Specific examples to review include:   * Generating payroll journal entries for each payroll run * Mapping payroll accounts (earnings, deductions, employer-paid benefits, taxes) to appropriate GL accounts and cost centers * Exporting journals in a format compatible with the City’s ERP (e.g., CSV, API, flat file) * Viewing audit trails of journal generation and export activity |
|  | Demonstrate how payroll entries are split and posted across fiscal periods (e.g., when a pay period spans fiscal year or month).   * Show allocation of payroll costs based on effective date or percentage   Validate fiscal year-end and month-end processing rules |
|  | Demonstrate the ability to provide the following reports:   * Check register report (customizing by name, department, cost center, etc.). * Quarterly federal and state tax summary report (including transmission to the IRS; federal, state, and local taxes; monthly pension). * Payroll subledger details, including expenditure and liability accounts. * Variance reports comparing prior pay to current pay. * W-2c file for transmission to the IRS.   Customized reports. |

## A Day in the Life

|  |  |
| --- | --- |
|  | **A Day in the Life** |
| **Session Description** | The City has scheduled **30 minutes** to provide supervisors an overview of commonly executable tasks to understand how they may interact with the future system. |
| **Target Audience** | This demonstration scenario is designed for supervisors and mid-level managers across various departments. It is particularly suited for individuals who manage daily operations. |
| **Vendor Instructions** | The City requests the following items are demonstrated as part of this session. |

|  |  |
| --- | --- |
| **#** | **A Day in the Life** |
| **Supervisors View Demonstration Scenarios** | |
| **DITL.1** | **Hiring Process –** The following items should be specifically addressed:   * Show the ability to post a vacancy. * Show how to review applications. * Show how to schedule interviews. * Show how to recommend a hire. * Show how to onboard a new hire. |
| **DITL.2** | **Time and Attendance:** The following items should be specifically addressed:   * Show how to review and revise supervisee time entry. * Show how to review and approve leave requests. * Show how to approve leave of absence. |
| **DITL.3** | **Reporting, Dashboarding, and Approvals:** Demonstrate the ability to generate managerial reports, including but not limited to:   * Dashboard overview for personnel (leave accruals, years of service, stipends, performance evaluations) * Dashboard overview for Time and Attendance (department calendars, scheduling forecasts.) |
| **Employee View Demonstration Scenarios** | |
| **DITL.4** | **Self-Service:** Demonstrate the self-service capabilities of the system. The following items should be specifically addressed:   * Show the ability users can view and update demographic and W-4 information in the Employee Self-Service. * Show the ability to submit qualifying life event (QLE) changes. * Show how users can view and print pay stubs and tax forms. * Show how users can modify direct deposit information with appropriate workflow and review. |
| **DITL.5** | Demonstrate use of mobile app capabilities on a cell phone. |

## Technical and Reporting

|  |  |
| --- | --- |
|  | **Technical Discussion** |
| **Session Description** | The City has scheduled **60 minutes** to demonstrate an in-depth look at the technical aspects of the system, focusing on its setup, configuration, and maintenance to ensure it meets the specific needs of the City. |
| **Target Audience** | This demonstration scenario is designed for IT staff and system administrators within the City. |
| **Vendor Instructions** | The City requests the following items are demonstrated as part of this session.  ***Please refer to requirements outlined in the RFP document “Functional\_and\_Technical\_Requirements\_Capabilities”*** |

| **#** | **Technical Discussion** |
| --- | --- |
|  | Discuss how all proposed system modules integrate with each other, including any third-party products proposed. Discuss whether any products interface other than in a real-time nature. |
|  | Demonstrate/discuss the interface (web services, XML, etc.) capabilities of the system for integration with other systems and communication protocols, including a description of the roles and responsibilities of the vendor and City project teams. |
|  | Demonstrate how to set up users, assign roles, and administer passwords. Discuss integration capabilities with Active Directory for application authentication. |
|  | Describe how FedRAMP-required security controls are implemented across all environments and how the vendor ensures continued compliance with federal cloud security standards. Include where system data is stored, how audit logs are maintained and protected, the roles of the vendor and City in maintaining compliance, and how audit results or FedRAMP documentation are shared with the City. |
|  | Demonstrate workflow capabilities, showing how technical or non-technical staff can modify existing workflows and create new workflows. |
|  | Discuss the web browser requirements for the version the City would be implementing. |
|  | Describe how system patches and enhancements will be performed throughout implementation and the control methods that will be instituted to manage this change. |
|  | Discuss the approach to support during implementation and after go-live. |
|  | Describe available resources for periodic training for new employees or for new functionality in upgrades. |
|  | Demonstrate the security features and auditing capabilities of the system. Discuss data security at rest and in motion. |
|  | Demonstrate the system’s ability to limit the number of records generated in a query, with notification to the user of an incomplete data set. |
|  | Describe the system’s ability to assign document or attachment classification based on user-defined criteria and workflows. |
|  | Describe the nature of the hosting method, including relative module of single versus multi-tenant. |
|  | Describe third-party audit and security penetration testing strategy, frequency, and how the results are shared. |
|  | Describe the redundancy and disaster recovery measures and capabilities, including the approach to testing. |
|  | Demonstrate the system’s production, testing, development, and training environment including the ability to track software changes applied to each environment and rollback as necessary. |
|  | Describe whether the City is responsible for data configuration (e.g., City versus vendor role during data configuration). |
|  | Discuss Section 508 compliance and how the system supports accessibility beyond simple compliance. |
| **#** | **Reporting and Analytics Demonstration Scenarios** |
|  | Demonstrate the ability to generate a recurring report and automate scheduled delivery using different file formats. |
|  | Demonstrate the ad hoc report writer and how it can be used by a novice to advanced user. |
|  | Demonstrate the wildcard search functionality. |
|  | Demonstrate the system’s ability to provide a key performance indicator (KPI) tracker. |
|  | Demonstrate the management dashboard and discuss how to configure it. |
|  | Demonstrate the ability to export to publishing applications for producing the final or "presentation" of the document (Word, Excel, PDF). |
|  | Demonstrate the ability to limit information on a report to a specific department based on security permissions. |

# System Integrator

## Company Overview

|  |  |
| --- | --- |
| **Company Overview** | |
| **Session Description** | The City has scheduled the first **30 minutes** to provide a company overview. This is an unscripted session, where vendors are asked to provide an overview of their company. |
| **Target Audience** | This demonstration scenario is designed for all demonstration participants. |
| **Vendor Instructions** | This is an unscripted session, where vendors are asked to provide an overview of their company. Potential topics include:   * Very brief company history * Software products proposed * Markets/industries served * Representative clients * Key differentiators |

## Implementation Discussion

|  |  |
| --- | --- |
|  | **Implementation Discussion** |
| **Session Description** | The City has scheduled the **90 minutes** to provide an overview of the implementation methodology, highlighting how the approach will be tailored to meet the City’s specific needs and ensure a smooth transition. |
| **Target Audience** | This demonstration scenario is designed for the project team, decision-makers, and leadership of the City involved in system implementation. |
| **Vendor Instructions** | The City requests the proposed project manager and key resources be available and lead as much of this discussion as possible.  ***Please refer to requirements outlined in the RFP document “Functional\_and\_Technical\_Requirements\_Capabilities”*** |

| **#** | **Implementation Discussion** |
| --- | --- |
| IMP.1 | Describe the relative commitment of named resources to the City project, why they were selected, and factors that may impact the need to change these resources for the actual implementation. If your firm did not name specific resources, explain why not. |
| IMP.2 | Describe your proposed project manager and implementation staff and their respective experience implementing a system in an environment similar to the City, including:   * Which specific projects has the project manager completed? How are they similar to the City’s? * How are implementation staff qualified to assist the City with achieving project goals and objectives? * What percentage of the estimated resource hours are for the project manager? * Approximately how often will implementation staff be on-site, how many staff, and what days of the week? * How often does a project manager change during an implementation? * On which previous projects have the proposed project team members worked together? |
| IMP.3 | Describe the proposed implementation methodology, define each phase of the project, and explain the strengths and benefits offered by following this approach. |
| IMP.4 | Describe whether your methodology encompasses proposed partners/subcontractors/third-party software and how you will manage the quality of these partners/products. |
| IMP.5 | Describe your proposed project schedule, including the proposed go-live date(s). Provide specific examples of other projects that followed a similar project schedule. |
| IMP.6 | Discuss why you feel the proposed number of hours in your proposal response is sufficient to implement the system at the City. This should include your level of effort/roles and responsibilities as well as the City’s level of effort/roles and responsibilities. |
| IMP.7 | Describe your approach to organizational change management. |
| IMP.8 | Describe your approach to leading the City through business process decisions based on configuration options within your software, including how these decisions will be documented and tracked. |
| IMP.9 | Describe at least two projects that were particularly successful at modernizing business processes with specific examples. Describe how your proposed methodology and team helped achieve those outcomes. |
| IMP.10 | Describe your approach to data conversion and consulting the City through data conversion decisions. Provide specific data conversion information, including the following:   * City roles and work effort. * Vendor roles and work effort. * Standard conversion levels and optional additional levels. * Timing and number of conversion passes. * Previous conversion experience from complex installations on similar versions of the City’s existing systems to your solution. * Previous conversion experience where data has degraded over time due to various users, existing issues, work-arounds, and evolving business processes. |
| IMP.11 | Describe your approach to testing and training. |
| IMP.12 | Describe your approach to managing a successful production cutover process. |
| IMP.13 | Discuss specific examples where other similarly sized organizations have faced challenges with similar projects and the steps you took to address those challenges. |