

King County Housing Authority

HCM RFP – Pre-submittal Questions

Question	Answer
<p>1. Please confirm the following ERP Modules in scope:</p> <ul style="list-style-type: none"> a. Human Capital Management (HCM) b. Core Compensation (Compensation package – hourly/salary/allowance plans) c. Advanced Compensation (processing of Merit) d. Benefits e. Time Tracking f. Absence g. Payroll h. Learning 	<p>The scope is as described in the RFP. Each vendor should propose the required modules to address the functional and technical requirements defined in the Requirements section.</p>
<p>2. Please confirm if the following ERP Modules should be added to scope:</p> <ul style="list-style-type: none"> a. Grants Management (We typically see this for Government deployments) b. Projects (We typically see this for Government deployments) 	<p>The scope is as described in the RFP. Grants Management and Project Accounting is managed in our ERP/Financials solution and is not part of the scope.</p>
<p>3. Deployment Timeline: Please confirm our understanding of the following potential new ERP deployment timeframes:</p> <ul style="list-style-type: none"> a. start: beginning of April 2023 b. Is there an expected deployment go-live date? For example, end of March 2024 or roughly 12 months? 	<p>a. Yes b. 12-18 months – to be reviewed with finalist vendor. Would be open to earlier Go-Live date, if possible.</p>
<p>4. What is your HR Annual Cycle: From what month to month?</p> <ul style="list-style-type: none"> a. Benefits Open Enrollment? b. Performance Reviews? c. Merit & if applicable Bonus? 	<ul style="list-style-type: none"> a. November b. Anniversary date c. Annual
<p>5. Client Resources: From a client resource perspective do you have adequate project resources from HCM (HR), functional areas for this deployment or do you need staff augmentation?</p>	<p>To be reviewed with finalist vendor. Provide your recommendations.</p>
<p>6. Process Standardization: How do you manage HR and Financials today (Centrally, decentralized, hybrid)?</p> <ul style="list-style-type: none"> a. (For example, in a decentralized model, “The County has different Time Tracking policies for hourly and salary workers by office location and this is managed by each location and not from a central hub such as the King County administration office.”) 	<p>Hybrid</p>

7. Worker Count: Please provide the counts for workers: a. Please confirm: King County has 400 Full time employees? b. How many contingent workers do you have? c. How many Retirees do you have?	Our headcount is 476 which includes regular, long-term temps, short-term temps, monthly stipends, seasonal and interns. a. See RFP - it states 400+ employees b. Contingent workers = 0 c. Retirees = not tracked in HRIS.
8. Contract Billing Type: Will this be a Fixed Fee or Time & Materials bid?	KCHA is open to vendor's approach.
9. Core HCM: Do you plan to track contingent workers within in your new ERP?	No
10. Core HCM: Do you have the need to track retirees? Do you pay your retirees through payroll?	KCHA has a retiree employment status. They are not paid through Payroll. Track retirees for ACA 1095-C reporting purposes.
11. Core HCM: If you have unions, how many do you have & do you track the unions at the worker or at the position level?	6 unions and we track at the worker level
12. Core HCM: If you have collective bargaining agreements (CBAs), how many do you have?	1 – Building Trades
13. Core HCM: Do you have workers with Multiple Jobs with different pay rates?	No
14. Core HCM: Describe your service delivery model and any unique custom security needs. Do you have needs to restrict security for certain groups (example: HR cannot see others in HR or executives.	See RFP Requirements section.
15. Core Compensation: Will you need to generate unique compensation statement documents to comply with Wage Theft Prevention legislation? If so, how many unique templates?	Yes – see RFP – Requirements #76.
16. Benefits: How many benefit plans do you have? (ex. medical, dental, HSA, voluntary life, LTD, 401k, commuter spending, pet insurance, Unions/CBAs, etc.)	Approximately 24. To be reviewed with finalist vendors. Where necessary provide assumptions to your cost proposal.
17. Benefits: How many unique benefit groups are anticipated? (e.g., grouping of workers for benefits eligibility)	See RFP - Requirements #51 J.
18. Benefits: If you have Unions/CBAs do you offer Benefits to Union employees?	Yes.
19. Benefits: Do you need to manage open enrollment in in your new ERP system? If so, what is your Open Enrollment period?	Open to explore this with selected vendor. Open Enrollment Period is November 1-30.
20. Benefits: Will you be using in your new ERP system to help determine a worker's Affordable Care Act (ACA) benefit eligibility?	Using the HCM solution as described in #75 of the Business Requirements section of the RFP.
21. Absence: How many different Holiday Calendars do you have?	1

22. Absence: How many unique Time-Off Plans (Accruing & non-accruing) do you have?	17+
23. Absence: How many unique Leave of Absence Plans (Entitlement & non-entitlement) do you have?	6
24. Absence: Do you allow the purchase, sale or donation of time off by employees?	Yes
25. Payroll: How many Legal Entities/Number of FEIN's do you use to pay your workers?	1
26. Payroll: How many Earning codes do you have? How many Deduction codes do you have?	Earnings – 164; Deductions - 122
27. Payroll: How many distinct pay cycles do you have? (i.e., # of bi-weekly, weekly, semi, monthly)	See RFP - Requirements #91.
28. Payroll: How many pay groups do you have? (i.e., # of Hourly, Salary)	See RFP – Requirements #51J.
29. Time Tracking: How many workers will capture their time in the ERP system? (Hourly and Salary)	All
30. Payroll: Please confirm your General Ledger system is remaining on Unit4/Agresso?	Yes – as stated in the RFP.
31. Time Tracking: Will you use any 3 rd party Time Clock collection devices?	No
32. Time Tracking: How many unique work schedules do you have?	See RFP – Requirements #80.
33. Time Tracking: Do you have Shift calculations?	Yes
34. Time Tracking: If you have unions, how many and what complexities or unique requirements are there for Time Tracking?	See RFP – as described in the RFP Requirements section.
35. Advance Compensation: Will you use in your new ERP system to process Merit and if applicable Bonus? If so, what is the number of: a. Merit Plans? b. If applicable, Bonus Plans?	Yes, less than 10 but no bonus. To be reviewed with finalist vendor.
36. Learning: How many employees will use in your new ERP system Learning? Will third-party vendors need to use in your new ERP system Learning for training?	All employees. No 3 rd party vendors.
37. Grants Management: if in scope, What is the Number of Active Awards? (I.E. Grant Contracts)	Not in scope per RFP.
38. Grants Management: if in scope, Do you recognize grant revenue on an accrual or cash basis?	Not in scope per RFP.
39. Grants Management: if in scope, Do you perform effort certification?	Not in scope per RFP.
40. Grants Management: if in scope, Do you have any pass-through grants, where as you are assigning funds to a sub recipient that isn't yourself?	Not in scope per RFP.
41. Grants Management: if in scope, How many Sponsors do you have?	Not in scope per RFP.

42. Projects: if in scope, Do you plan on entering Time on Projects?	Yes
43. Projects: if in scope, Do you track projects at a granular level, for instance, to the phase and/or task?	Yes
44. Projects: if in scope, What is the Number of Capital Projects? What is the Number of Non-Capital Projects?	Approximately 325+ capital and non-capital projects altogether.
45. HCM: How many of the following will you be converting: a. # of Active Employees? b. # of Terminated Employees? c. # of Employee Photos	a. approximately 480 active employees b. None c. unknown To be reviewed with finalist vendor.
46. HCM: Will you convert Job And Compensation History?	Yes
47. Benefits: will you be converting the following: a. Current Benefit Elections? b. Current year ACA Medical History? c. Current year ACA Worker Hours and Wages? d. Dependents & Beneficiaries? e. Benefit Annual Rates?	Yes – to be reviewed with finalist vendor.
48. Absence: will you be converting the following: a. Time off Balance? b. Active Leaves for Previous 12 months?	Yes – to be reviewed with finalist vendor.
49. Payroll: will you be converting the following: a. US only – Payroll Balances for Current Year b. US only – Worker Tax Elections	Yes – to be reviewed with finalist vendor.
50. What internal change management, communications, and training capabilities/resources do you have or expect to have for this project?	To be determined.
51. What are some past projects you’ve executed and how did they go? What were your pain points?	Not relevant to this RFP.
52. Have you conducted any stakeholder or readiness assessments related to this initiative? If so, what were the results?	No formal process. KCHA staff is ready for this change.
53. Have you used a Change Champion Network successfully in past initiatives?	Yes
54. What are the big changes/outcomes you expect from your ERP implementation? How will the day-to-day experience of employees, managers, and HR change as a result of your implementation?	KCHA is ready for a change in HCM solution to provide the required features and functionality of an integrated solution.
55. Briefly describe your organization’s culture and estimated level of resistance to change/adoption of technology.	KCHA is ready for a change in HCM solution to provide the required features and functionality of an integrated solution.
56. Will development of training materials (job aids, Captivate simulation videos, PPTs, etc.) be created internally or by your partner?	To be determined. Provide assumptions to your proposal.

57. Has KCHA established a budget for software and implementation costs for your HRIS project that you can share?	Yes
58. Is KCHA utilizing a consulting firm to assist with creating the RFP and the RFP process?	Yes
59. Can you confirm your total employee count?	476
60. How many years of historical HR and Payroll data do you need?	At this time we expect to migrate active employees with history dating back to 08/01/2010. To be discussed with finalist vendor.
61. Are you looking for total cost for years 1 and then years 2-10?	Yes, on year 1 and 2-10 years. We want to see cost for incremental years. See pricing document on RFP.
62. How does the Authority currently manage benefits? Is it outsourced to a 3 rd party?	KCHA has a hybrid model with split of in-house and TPA services. It is manage in house, however there are multiple TPAs that our HR Team works with directly.
63. How is eligibility managed if a 3 rd party is used?	Eligibility requirements is both mandated by PEBB/WA State HCA which is governed by WAC Rules and KCHA Policy. For Retirement Eligibility, KCHA follows State DRS Retirement Rules. For Navia Benefits eligibility, we follow IRS rules and KCHA/PEBB rules. For State DCP and Empower, we are governed by IRS Rules and KCHA Policy benefit eligibility (i.e. benefit position vs. non-benefit position are defined by employment status).
64. How does the Authority currently administer Cobra benefits? Is the process outsources to a third party or managed in house?	COBRA administration for Medical, Dental, Life and LTD are strictly managed by PEBB. COBRA Administration for FSA Health and DRP are contracted with Navia Benefit Solutions. KCHA staff do not handle any COBRA administration. Ideally, we want the system to be able to generate Benefits Letter (Exit Benefits Letter) for departing employees.
65. Would you like UKG to handle your tax filings? Check printing? Garnishment services?	No
66. Would you like UKG to print/mail W-2s?	Yes