



# CHESAPEAKE BAY FOUNDATION

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*Saving a National Treasure*

HRIS Project

Request for Proposal  
November 13th, 2023

Due Date and Time  
Friday December 15th, 2023, at 11:59 PM

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## 1 Introduction

The Chesapeake Bay Foundation (CBF) is requesting proposals from qualified firms to provide an HRIS (Human Resources Information System) solution. Our primary objective is to identify a cloud based HRIS solution that includes core HR and Payroll functionality. The solution can be either a full HRIS system with built in modules, or a core solution that easily integrates with best-in-class solutions for the other needs listed within the requirements section of this RFP.

The successful Offeror(s) will be expected to work closely with CBF's designated Project Management Team to administer an effective and efficient program and to successfully implement a complete solution.

### 1.1 Intent to Bid

Please provide an email response of your intent to bid on this RFP. Providing this information to CBF will allow you to be copied on all updates to the RFP process including vendor submitted questions, and CBF responses.

Within your email, please provide the following information by 11/28/2023.

To: **MScott@cbf.org**

Email Subject Line: **CBF HRIS Project Intent to Bid**

Company Name

Contact Name

Phone

Email

### 1.2 RFP Due Date

Offers shall be received via a Box File Request. Offers must be received by 11:59pm Est on December 15th, 2023. Please use the link below to upload proposals and supporting documents.

[CBF HRIS Project RFP Responses](#)

### 1.3 Response to Questions

Please submit questions in an email to McKenzie Scott at MScott@cbf.org. Any and all questions regarding this RFP shall be directed to McKenzie Scott, no other office or individual at CBF.

Informal questions may be answered orally. CBF makes no warranty of any kind as to the correctness of any oral answers and uses this process solely to quickly provide minor clarifications. Oral statements or instructions shall not constitute an addendum to this RFP. The offeror shall not be entitled to rely on any verbal response from CBF. Formal questions regarding any part of this RFP that may result in material changes will result in a formal addendum to the RFP.

All questions should be submitted by 12pm Est, 11/30/2023 to ensure a response from CBF.

#### 1.4 Finalist Vendor Meetings

CBF will request a meeting with a select group of finalists to further investigate if the partner organization is a good fit for CBF. Meetings can be conducted virtually and CBF will attempt to limit them to 2 meetings of 1-2 hours in duration.

It will be the responsibility of the bidding organization to organize and/or prepare for the required meetings.

#### 1.5 Final Contract Negotiations and Notification of Award

This RFP is part of a competitive negotiation process intended to allow CBF to obtain services as outlined herein in a manner that is most advantageous to CBF. This RFP provides CBF the flexibility to negotiate with Offerors, and if desired, to arrive at a mutually agreeable relationship. Price may weigh heavily in the evaluation process but will not be the only factor under consideration and may not be the determining factor.

#### 1.6 Intent

It is CBF's intent to select an offer or offers that allow CBF to best fulfill the goals of the project and which are most favorable in all respects, including scope, availability of services, quality of services, reputation, and price.

#### 1.7 Authority

This document was developed by CBF Project Management Team with guidance from the Vice President of Administration and the Executive Management Team of the organization.

This document has been prepared for use by internal organization audiences as well as industry suppliers. It should not be provided to external bodies without the express written or verbal consent of the Vice President of Administration.

CBF will not reimburse any information or administrative costs incurred as a result of participation in response to this RFP. All costs associated with response will solely reside at the responding party's expense.

#### 1.8 Confidentiality

All information included in this RFP is considered confidential and intended only for use by responders. No information included in this document, or in discussions related to CBF's HRIS project, may be disclosed to another party, or used for any other purpose without the express written or verbal consent of CBF.

## 1.9 Audience

The intended audience for this document is companies with experience implementing HRIS systems.

### 1.9.1 Minority Participation

CBF actively encourages proposals from Small, Women and Minority Owned (SWAM) Businesses. Please note if you are a Small, Women or Minority Owned Business and if you are certified by the State/Commonwealth/DC.

### 1.9.2 Minimum Requirements

At a minimum, you must be able to provide the following and have the following qualifications.

- Must be able to provide a Certificate of Insurance including General Liability, Auto and Workers Compensation.

## 2 CBF Organizational Information

### 2.1 About CBF

Founded in 1967, the Chesapeake Bay Foundation (CBF) is the largest independent conservation organization dedicated solely to saving the Chesapeake Bay. Serving as a watchdog, we fight for effective, science-based solutions to the pollution degrading the Bay and its rivers and streams. With offices in Maryland, Virginia, Pennsylvania, and the District of Columbia as well as 15 field centers, CBF leads the way in restoring the Bay and its tributaries. CBF has between 200 and 250 employees across the watershed. CBF is a non-profit organization.

### 2.2 Project Background and Current Environment

CBF is consistently recognized as the premier organization dedicated to saving The Chesapeake Bay, a National Treasure. To continue to lead in this endeavor CBF will invest in a solution to enable our Human Resources team to better serve the organization.

Our HR & Payroll teams currently use different systems that are not integrated. This means duplicate data entry, poor reporting and delayed information sharing. To address this need, CBF is requesting offers from qualified firms for an HRIS platform that will improve operational efficiencies.

HR & Payroll Systems in use include:

- Asure Software HCM  
HR employee information including all benefit enrollments, 403B etc., payroll - payroll processing, salary adjustments, pay rates, earnings reports and year end audit W2s report and generation. APTM monthly, quarterly and annual tax reporting and payment. Local, County, State (multiple states, MD, PA, VA, DC, TX, NC, IL & IN) and Federal. ACA data collection and year end reporting. Generation of 1094 and 1095s.
- AsureForce Time and Attendance.  
Timesheet creation. Timesheet reporting. Leave requests. Leave accruals and tracking.
- Employee Navigator  
Benefit Management System

CBF's Accounting team uses:

- Sage Intacct

CBF core technologies include:

- Microsoft Office 365
- Microsoft Power BI
- Box cloud storage
- Okta
- Smartsheet

### 3 Statement of Need

#### 3.1 Project Goal

The fundamental goal of this project is to find and implement an HRIS solution at the Chesapeake Bay Foundation.

#### 3.2 Scope of Work

The scope of work should include setting up an HRIS platform, the evolution of processes to most efficiently utilize the solution, data transfer, and the training of staff in the software.

CBF expects the costs of the solution to be included in the proposal. If the solution is modular, the cost associated with each module should be listed.

CBF uses a bi-weekly payroll, so approximately 26 payroll runs a year. Please base pricing on 200 – 250 employees. Include:

- Licensing fees.
- Annual Maintenance costs.
- Training costs.
- Ongoing monthly fees.
- Hosting fees.
- One-time fees.
- Customization and/or integration fees.

Please also include the frequency and timing of the billing process.

#### 3.3 Expectations of Vendor

- Conduct limited research and analysis to inform the implementation method for the new HRIS system.
- Assist in the configuration and customization during the implementation process.
- Provide a plan for data migration and complete the required data migration.
- Provide a training plan for all users of the new system.

#### 3.4 Functional Requirements

Focus	Detail
HR & Payroll Requirements	<p>The system will cover the lifecycle of employees, from application to term. Including.</p> <ul style="list-style-type: none"><li>● Basic demographic and address data.</li><li>● SSN</li><li>● Contact information.</li><li>● Recording of certifications.</li><li>● Personnel Paperwork.</li><li>● Compensation data to include but not limited to the following increases (bonus, COLA increases, retention, promotion, internal job changes, etc.)</li><li>● Position codes that do not impact multiple facets of the database structure of employee information.</li></ul>

	<p>Intergraded HR/Benefits, payroll, and timesheets. In addition,</p> <ul style="list-style-type: none"> <li>• ACA module to track yearly compliance and produce 1094s and 1095s at year end.</li> <li>• Tracks when staff are eligible for offer of care.</li> </ul>
	<ul style="list-style-type: none"> <li>• Ability to set new pay rates with “as of” date, ability to have multiple pay rates.</li> <li>• Multiple pay rates, leave pay, specialty pay calculations.</li> <li>• Provide external online access for employees to access their pay statement, benefit enrollment and demographic information – view only access.</li> <li>• Federal &amp; State Taxes – Monthly, Quarterly and Annual filing and payment.</li> </ul>
	<p>Timesheets integrated with payroll.</p> <ul style="list-style-type: none"> <li>• Needs to enable validation rules.</li> <li>• Timesheet fields must include: <ul style="list-style-type: none"> <li>○ Department code.</li> <li>○ Project code.</li> <li>○ Location code.</li> <li>○ Campaign code.</li> <li>○ Lobbying code.</li> </ul> </li> <li>• Submission of tax payments electronically.</li> <li>• Completion of all quarterly tax returns.</li> <li>• Preparation of all W-2s.</li> <li>• Tracking and reporting of workers’ compensation premiums by pay period based on wages paid.</li> <li>• Employer benefits calculations.</li> <li>• Garnishment management.</li> <li>• Manual payroll checks.</li> <li>• Pre/post tax deductions setup.</li> <li>• Bi-weekly, quarterly, and annual reports on payroll information (i.e., check register, labor distribution, etc.) in an electronic format.</li> <li>• Preparation of direct deposit files and checks for each payroll. Payroll data to be submitted electronically for processing on the Tuesday prior to payday; (would prefer to have Wednesday as due date prior to payday) payroll register report to be returned electronically for review not later than 11:00 a.m. on the Tuesday (would prefer to have Wednesday as due date prior to payday).</li> </ul>
	<p>Vendor generates employee ACH direct deposits.</p>
	<p>Leave &amp; Absence Management.</p> <ul style="list-style-type: none"> <li>• Leave accruals and tracking balances by leave category.</li> <li>• Disability.</li> <li>• FMLA.</li> <li>• Worker’s Comp hours.</li> <li>• Provide leave accounting and reporting (annual, sick, holiday, personal, FMLA, military, disability, workers compensation, multiple types of administrative leave, leave donations, leave payouts, etc.)</li> <li>• Provide automatic change in leave accrual based on years of service, reduction/ increase in hours.</li> <li>• Manual entry for timesheets.</li> </ul>



	<ul style="list-style-type: none"> <li>• Must comply with time and effort reporting for Federal grant funding.</li> </ul>
	<p>Hiring and Applicant tracking documents.</p> <ul style="list-style-type: none"> <li>• Job Posting and tracking of applications.</li> <li>• Searchable applicant database.</li> <li>• Applicant communication (email and text).</li> <li>• Customizable by role (recruiter, hiring manager, etc).</li> <li>• Customizable recruit flow/hiring process.</li> <li>• Reporting.</li> <li>• Data Import/Export.</li> <li>• Applicant database with search capabilities.</li> <li>• Job Description.</li> <li>• Recruitment Metrics.</li> <li>• Application and Cover Letter.</li> <li>• Interview dates and scorecards.</li> <li>• References.</li> <li>• Background Check.</li> </ul>
	<p>Onboarding Documents.</p> <ul style="list-style-type: none"> <li>• Offer letter. <ul style="list-style-type: none"> <li>○ Start and end dates.</li> <li>○ Annual Salary/Bi-Weekly Salary.</li> </ul> </li> <li>• State &amp; Federal Tax Documents.</li> <li>• Direct Deposit Information.</li> <li>• Invitation to Self-identify.</li> <li>• Veteran Status.</li> <li>• I-9.</li> <li>• Employee Information/Emergency contact(s).</li> <li>• Employee handbook Acknowledgement/receipt.</li> <li>• Availability of on-line, fillable forms and electronic transmission to human resources or payroll.</li> </ul>
	<p>Offboarding</p> <ul style="list-style-type: none"> <li>• Schedule an exit interview.</li> <li>• Notification to manager to complete a Separation Checklist.</li> <li>• Process Separation checklist for signature.</li> <li>• Notification to IT to close the account.</li> </ul> <p>Payroll/Benefit Offboarding</p> <ul style="list-style-type: none"> <li>• Prepares a Benefit Term letter that reviews all benefit options following term (COBRA, Life, Disability, EAP, etc).</li> <li>• Adds term date to all HRIS/Benefit Management systems (Asure, Asure Force and Employee Navigator).</li> <li>• Processes Vacation payout with last paycheck.</li> <li>• Processes Severance payout for certain terms.</li> </ul>
	<p>Employee Self-Service Capability with an Admin approval (update emergency contact info, address, name changes, tax documents, direct deposit, pay stubs, timesheets, etc).</p>
	<p>Application of data retention policies.</p>
	<p>Timely &amp; responsive support.</p>
Compliance	<ul style="list-style-type: none"> <li>• IRS annual limits for social security tax, 403B contributions, HSA, FSA.</li> <li>• Tax, unemployment rates, and wage limits by state.</li> <li>• Overtime rates at State and Federal level.</li> </ul>

	<ul style="list-style-type: none"> <li>• CBF's annual 403B, financial and federal audits require SOC1 and SOC2 reporting provided by the vendor/auditor covering fiscal year.</li> <li>• Federal Audit Compliant.</li> <li>• Not for Profit compliant.</li> <li>• FLSA compliant.</li> <li>• State Wage Payment and Employment Standards compliant.</li> <li>• GAAP compliant.</li> <li>• Compliance with USCG Regulations (Drug Testing) - ability to save to employee profile and track.</li> </ul>
Benefits Management	Integrate with Employee Navigator for importing Benefit Costs into payroll.
	Open Enrollment processed through Employee Navigator.
	Integration with TIAA and Cref.
	Support an online enrollment experience for employees.
	Implementation of mass changes to employee information and/or benefits (i.e., changes to benefit plan premiums, across-the-board pay increases, etc.).
	Workers Compensation Injury Tracking, (incident report, out of work timeframe, doctor notes, etc).
	FMLA/Disability/Leave of Absence Tracking (include required FMLA documents, leave schedules, approval, doctor notes/restrictions for return to work, etc.).
	Provide online access for employee to access his/her pay statement, benefit enrollment and demographic information – view only access.
Reporting & Analytics	Workers Comp audit/reporting.
	Earning & Hours report for Audit/Census.
	403(b) reporting (employee and employer contribution per payroll and annually).
	Notification of expiring certificates.
	FTE reports.
	Deductions reports.
	General Ledger report.
	Timesheet report and analytics.
	Quarterly 941s tax reports.
	Quarterly and annual metric/demographic reports.
	Salary reports that include vacant positions.
	Work/Position and Salary History.
	Vacant position report for recruitment.
	Ability to create custom reports when needed.
	Ability to export data into .csv format.
Performance Management	<ul style="list-style-type: none"> <li>• Real-time Feedback.</li> <li>• Individual, Role, Group Feedback.</li> <li>• Self-Assessments.</li> <li>• 360-Degree Feedback.</li> </ul>
	Create Performance Appraisals.
	Push Notification Messaging.

	Cloud-Based Web Portal. Mobile Accessible.
	Administrator Dashboard.
	Reporting.
Technical Requirements	True-Cloud Multi-Tenanted SaaS Architecture
	SAML Single Sign-On compatible for current CBF staff. Former staff should be able to log in with personal credentials.
	Must complete CBF's Vendor IT Security Questionnaire.
	Availability: Expect the platform to be always available with planned maintenance and/or upgrades scheduled for low use times. Solution must come with a contractual, financially backed, SLA.
	Granular security controls. Tiered groups, (e.g. Admins, Editors, Viewers) with ability to control view/edit at and access permissions by module/function.
	Mobile/Web Application. Staff need to fill out timesheets and access paystubs and W2s.
	Secure Document Storage.
	Automated onboarding and offboarding alerts.
	Flat file payroll journal entry import into Intacct (ideally API integrated, see below)

### 3.5 Optional Nice-to-haves.

HR	Safety Training, tracking and notification abilities (WFA certification needed every two years).
	Organizational Charts
	Succession Planning
	Dedicated support contact
	Benchmarking Data Saved for each employee/position
Accounting	Intacct Integration
Technical	Integration with Office 365
	Integration with Active Directory/Microsoft Entra ID.
	Integration with Box
	Integration with Microsoft Power BI
	Available and documented API

## 4 RFP Response

Offer shall be submitted in the format requested in "Required Response Format" section. Offers in any other format may be rejected. Conditional Offers shall not be considered. Cover Letter to be signed by an authorized individual. Offer that is not signed may be rejected.

Offers shall be received via Box file upload by December 15th, 2023, 11:59 PM ET. Please use the link below to upload all proposals and supporting documents. A confirmation email will be provided.

### [CBF HRIS Project RFP Responses](#)

The following structure should be used in the offeror's response to this RFP.

#### 4.1 CBF Evaluation Criteria

It is CBF's intent to make an award to Offeror that, in the opinion of CBF, presents an offer that appears to be favorable to CBF, based upon the scope, reputation, and price offered. The criteria for evaluation of responses will be:

- Offeror's platform quality, resources, references.
- Offeror's ability to assist CBF in the adoption of chosen platform.
- Platform's fit with CBF's HR processes and needs.
- Implementation methodology.
- Price Proposal.

#### 4.2 Required Response Format

Please include all the requested information in your response.

- Cover letter and Executive summary signed by authorized individual.
- Overview of proposed solution. Please provide a general overview.
- Company, References and Team Resources.
- Company overview. Please include,
  - Name
  - Address
  - Phone
  - Email
  - Website
  - Company background.
  - Any additional information that you feel would be helpful in demonstrating the financial stability of your company.

#### 4.3 References

Provide three or more references identifying organizations similar to CBF. Provide the name of the organization, contact person, email and telephone number. CBF reserves the right to contact additional references not provided by Offeror.

Preference may be given to those references from organizations most like CBF.

Please provide three references:

- Organization Name
- Contact
- Phone Number
- Email

- Description of work performed for client.

#### 4.4 Proposed Agreements – Required Contract Documents

Please include the following documents described as part of your proposal. CBF anticipates reviewing all terms and conditions and will provide feedback and/or comments prior to the contract award.

- Professional Services Statement of Work (SOW).