



REQUEST FOR PROPOSALS

RFP # 17-04-15

BENEFITS ADMINISTRATION

PART II

The Houston Independent School District ("HISD" and/or the "District") is soliciting proposals for **Benefits Administration** as more fully set out in this Request for Proposals ("RFP"). One (1) hard copy original of the proposal, one (1) hard copy duplicate of the original, and two (2) USB drives of the proposal must be submitted in accordance with the instructions set out herein to:

Houston Independent School District
Board Services - Room 1C03
Attn: Aishya Johnson- Procurement Services
RFP / 17-04-15 Benefits Administration
4400 West 18th Street
Houston, TX 77092

The following schedule and timelines apply to this RFP. The following timelines are subject to change at the District's discretion:

Timeline	
Release RFP	Thursday, July 6, 2017
Pre-Proposal Conference	Thursday, July 18, 2017, at 2:00 PM in Conference Room 2E26, Hattie Mae White Educational Support Center, 4400 West 18th Street, Houston, Texas 77092
Last date for questions:	Tuesday, July 25, 2017, by 12:00 PM
RFP Due	Tuesday, August 8, 2017, by 10:00 AM
Evaluation Period	August 14, 2017 through August 20, 2017 (subject to change)
Selected Proposal(s) Approved	Next regularly scheduled Board meeting after interviews and selection

Each set of the proposal must be submitted in a binder. The original proposal must be labeled "ORIGINAL" and contain original signatures. The copies of the original must be labeled "COPY." Response submission must be delivered in a sealed folder or container (i.e. envelope, box, or

bin). If documents are submitted in an unsealed container or folder, the District is not responsible for any unsealed/unlabeled documents and materials.

Each binder and any container for the binder(s) must be labeled on the outside with the Proposer's name, address, the RFP number and the RFP name. Each USB drive must be labeled with the RFP number and the vendor name.

Proposals will be received at the above address until Tuesday, August 8, 2017, by 10:00 AM Central Standard Time. A pre-proposal conference will be held in conjunction with the RFP on Tuesday, July 18, 2017, at 2:00 PM at Hattie Mae White Educational Support Center, 4400 West 18th Street, Houston, Texas 77092 in Conference Room 2E26. Submitting proposals prior to the pre-proposal conference is not recommended, and such proposals may be rejected by HISD. A more detailed timeline is set out in the Instructions, Submission Requirements and Procedures section of the RFP. Proposals will be reviewed as received in a manner that avoids disclosure to competing proposals. Contents of proposals will remain confidential during the negotiations period. Only the project [RFP] number and the identity of the Proposer(s) submitting the proposal will be made available to the public before award of the RFP.

Faxed or emailed proposals will not be accepted. Proposals must be submitted in sufficient time to be received and time-stamped at the above location on or before the proposal due date and time. HISD will not be responsible for proposals delivered late by the United States Postal Service, or any other delivery or courier services. Proposals received after the Proposal due date and time will not be considered. All proposals must remain open for one hundred twenty (120) days from the proposal due date pending acceptance by HISD.

The designated Sourcing Specialist during the proposal process will be Aishya Johnson-Dixon, Procurement Services, 4400 West 18th Street, Houston, Texas 77092, aishya.johnson@houstonisd.org. All communications pertaining to this proposal must be addressed in writing via email to the Sourcing Specialist, as indicated in the next paragraph.

Questions concerning the RFP will be answered only if sent to the Procurement Services Department, in writing via email to aishya.johnson@houstonisd.org **by 12 PM Central Standard Time on July 25, 2017**. If there is a pre-proposal conference, responses to written questions submitted prior to the pre-proposal conference will be read at the pre-proposal conference, and included in the first addendum along with additional information including questions and responses from the pre-proposal conference. All questions submitted in writing to the Project Manager prior to the deadline will be answered in the form of addenda. All addenda will be posted on the HISD Procurement website.

The General Terms and Conditions for Requests for Proposals governs this RFP and any contract(s) awarded under this RFP. This document can be downloaded and printed via HISD Procurement Services website or requested in hard copy format via email to Sourcing Specialist [Name] at [email]@houstonisd.org. HISD will be entitled to assume that by submitting a Proposal, all Proposers have reviewed and consented to all provisions of the General Terms and Conditions.

The District will award this RFP to **one or more supplier(s)** based upon the evaluation of all proposals received. More details regarding the evaluation of proposals are included in Section II below.

Richard Gay

Richard Gay, CPPO, Officer of Procurement Services

07/06/2017

Date

SECTION I:
PROPOSAL RESPONSE REQUIREMENTS

The Proposal shall be submitted in a binder with tabs as set forth below:

Title Page

Show the RFP subject, the name of the Proposer's firm, address, telephone number, name of contact person, and date. Please include the table below on the Title Page. Select all the market basket(s) the proposer will apply for.

Check (✓) the all area(s) that apply		
	2.1.1	BENEFITS ADMINISTRATION
	2.1.2	LEAVE ADMINISTRATION

- **Tab 1 – Table of Contents**

Clearly identify the materials by sections and page numbers

- **Tab 2 – Proposal Submission Forms**

Complete and return Forms A through M set forth in Part III of this RFP. The set of forms submitted in the proposal marked "ORIGINAL" requires original manual signatures. Copies of the forms bearing original signatures should be included in each additional proposal.

The forms provided in Part III should be submitted in the following order:

1. FORM A: Supplier Information (CHE (Local) Questionnaire)
2. FORM B: MWBE Instructions and Participation Report
3. FORM C: Reference Survey Instructions
4. FORM D: Reference Survey (Survey will be requested if needed)
5. FORM E: General Certifications
6. FORM F: Price Schedule (if applicable) (should be placed in tab 7)
7. FORM G: EDGAR Certifications
8. FORM H: Exception Forms
9. FORM I: Conflict of Interest Instructions and form CIQ
10. FORM J: Instructions for Completion of Disclosure of Interested Persons Certification (HB 1295)
11. FORM K: IRS Form W-9
12. FORM L: Certificate of Insurance (Acord Form) or a letter from its insurance provider stating that Proposer can provide the levels of insurance required in this RFP.
13. FORM M: Acknowledgement Form
14. FORM N: CRIMINAL HISTORY BACKGROUND CHECK CERTIFICATION
15. APPENDIX A: Questionnaire (Should be placed in tab 5)
16. EXHIBIT 1: HISD Cafeteria Plan
17. EXHIBIT 2: Life Event Matrix
18. EXHIBIT 3: Inbound Deduction File Layout
19. EXHIBIT 4: IDF File Layout
20. EXHIBIT 5: Duty Schedule

- **Tab 3 – Profile of the Proposer**

- a. Indicate the key people in your organization assigned with a hierarchy chart to provide this service to the District and their level of experience and qualifications and the percentage of their time that will be dedicated to this project.
- b. Provide a list of the Proposer's current top **three** clients and discuss services your organization has provided and/or performed for each client.
- c. If applicable: Provide the last three years of financial statements

- **Tab 4 – Scope Section**

Clearly describe the scope of the goods and /or services to be provided based upon the information in the Section II, Scope of Work.

- **Tab 5 – Questionnaire Response — **APPENDIX A: Questionnaire (s)****

Respond to the questions and/or questionnaires included in the RFP.

- **Tab 6 – Invoice Procedure**

- a. Describe the proposer's invoicing procedures.
- b. Include documentation identifying all of the Proposer's fees.
- c. Payment terms. The District's standard payment terms are 30 days after invoice is received. State any payment discounts that your company offers, i.e., 2% 10 days – net 30; or 5% 7 days – net 30.

- **Tab 7 – Price - **FORM F: Price Schedule****

Any and all pricing information, including any alternate pricing proposals that may be acceptable for some projects. Include a hard copy of Form F (Price Schedule) in this section, if applicable.

- **Tab 8 – Addenda**

Insert all addenda under this section.

- **Tab 9 – Criminal Background Check Certification**

Insert one of the certifications that applies to your company:

- a. Criminal History Background Check Certification - **With direct contact with Students**

- b. Criminal History Background Check Certification – **No direct contact with students**
(The supplier's proposal will be considered non-responsive if the supplier fails to submit one of these certifications at the moment of submitting said proposal)

SECTION II: **SCOPE OF WORK**

GENERAL INFORMATION:

Houston Independent School District (HISD)

According to 2015 Facts and Figures, HISD, located in Harris County, Texas, is among the largest employers in Houston with a 2015 – 2016 budget exceeding \$1.8 billion. It operates as the largest public school system in Texas and the seventh-largest in the US. HISD serves a population of approximately 215,000 students covering 287 campuses including elementary schools, middle schools, high schools, charter schools, and community-based alternative programs.

HISD has approximately 29,402 full-time and part-time employees of which approximately 11,854 are teachers. Total benefits-eligible employees number approximately 24,000. These employees work at locations in a variety of positions that include teachers, bus drivers, school principals, custodians, administrators, office support and skilled trades. HISD is seeking proposals in the RFP for an April 1, 2018 effective date.

Aldine Independent School District (Aldine ISD)

Located in North Harris County, Texas, Aldine ISD encompasses 111 square miles and operates as the eleventh-largest school district in Texas with a budget exceeding \$600 million. Aldine ISD serves a population of more than 70,000 students covering 76 campuses including elementary schools, intermediate schools, middle schools, ninth grade schools, high schools, magnet schools, and alternative campuses.

Currently, Aldine ISD has approximately 10,223 benefits-eligible employees, of which approximately 6,163 are covered under the medical plan. These employees work at 89 locations in a variety of positions that include teachers, bus drivers, school principals, custodians, administrators, office support, and skilled trades. Aldine ISD is seeking proposals for all plan requests in this RFP for an April 1, 2018 effective date.

The Health Care Partnership (THCP)

The Health Care Partnership (THCP) is a collective purchasing initiative. Three large Texas-based school district organizations are included – Houston Independent School District (HISD), Aldine Independent School District (Aldine ISD), and Katy Independent School District (Katy ISD). THCP began purchasing benefits, benefits administration, and consulting on a collective basis in the spring of 2001 under the initial name of Texas Independent School District (TISD) collective. As other employers have expressed interest in collective purchasing, TISD's name was revised to THCP as expansion outside of Texas is a program goal. For purposes of this RFP, all references to THCP include Houston Independent School District (HISD) and Aldine Independent School District (AISD), unless otherwise noted. Katy ISD is not participating in this RFP.

Current Plan Administration: Each District's current plan offerings are described and explained in detail on the District's benefits websites. The descriptions include summary information as well as full plan descriptions, current provider information, and helpful links. Please visit each District's benefits website at www.hisdbenefits.org and www.aldinebenefits.org.

Each school district has complete autonomy with their own plan designs, clinical programs, etc. and may make their own decisions which may or may not mirror the other school district. All Districts are public entities and, as such, are subject to FOIA.

Note: while not required to comply with ERISA requirements due to the school districts being public entities, they do closely follow ERISA guidelines.

2.1 SCOPE OF WORK:

At minimum, the District is seeking the following goods and/or services to be provided by the Supplier(s):

Check (✓) the market basket(s) in which proposal is aligned. Check all that apply.

Check (✓)	Market Basket	Product Category Title
	2.1.1	Benefits Administration
	2.1.2	Leave Administration

- For each market basket below, **describe how your product satisfies the requirements for the applicable market baskets as stated in Scope of Work.**
- If you have additional supporting documents, you may attach them to this RFP and/or include them in your Tab 4 response. However, you must complete this form and respond to each requirement statement. If a requirement does not apply to your product, then indicate "N/A" and state the reason.
- A supplier **will not** be disqualified if he/she does not bid on all **two (2) market baskets**.

2.1.1 Benefits Administration Services

A. Automated benefits enrollment and maintenance system

Supplier is to support HISD's benefits program (for details on the benefit plans covered, please refer to www.hisdbenefits.org) through a secure web-based automated enrollment site. HISD will consider an automated life event system, but Supplier needs to provide details on system capabilities to determine and verify that election meets HISD rules and standards and is also compliant with all federal and state laws and regulations, including the Affordable Care Act. Currently, life event changes are handled via customer service representatives. Enrollments are handled either through the web-based enrollment system or through a Benefits Customer Service Representative (BCSR). However, BCSR's are not allowed to make beneficiary designations for life insurance. Supplier provides a biweekly data feed to HISD (changes only file, except for annual enrollment file), and weekly carrier files (generally a full file), and a monthly file to the data warehouse. HISD provides a weekly update file to Supplier. Supplier is to provide remote read only access for HISD staff and onsite benefit administration staff to view elections, view call data and run basic reports. HISD uses a single sign on located on the HISD employee portal. Vendor should provide breakdown of all fulfillment items and fees included and disclose optional fees.

The Employee Enrollment Page must have the following capabilities:

- Prefer Federated Identity (FID) (provides single access to multiple systems across different enterprises) login
- SAML 2.0 Integration
- Enrollment Instructions
- System timeouts and corresponding messages
- Employee introduction page
- **Benefit Changes, Event declarations, Event-specific instructions**
- Various links to each plan's information
- Links for employee to review current elections, dependents, beneficiaries, and future-dated life event changes
- Links to the decision support tools
- Allow employee to elect an annual FSA contribution amount or a per-pay period contribution amount
- Pending employee life insurance election until an EOI form is approved by the life insurance carrier
- Posting of Benefits communications and reminders
- Pop-ups to acknowledge, review and confirm changes; certification statement, and agree to payroll deductions
- Frequently Asked Questions (FAQ) page
- Self-Service options which include email & chat

See attached **EXHIBIT 1: HISD Cafeteria Plan** containing HISD's Section 125 Plan Document.

- B. **Benefits Administrative Web Enrollment Application** – features role-based security, advanced name search capability, access to employee and dependent event and benefit history, and the ability to manage pending benefits, events, and dependents. Although not required, HISD would to explore the Vendor call center representative's ability to administer 'act as' or enroll on behalf of enrollments and administrative changes for employees.
- C. **Benefits Customer Service Call Center** - a dedicated (preferred) or designated (minimum) call center team to handle HISD benefits customer service issues (and life event changes if not part of automated system) as well as call-in enrollments and life event issues. All calls should be recorded. Supplier should be able to grant HISD access to historical documents for at least six months after the contract expiration date. These documents include, but are not limited to, case notes, recorded calls, imaged correspondence, etc. Vendor should have the ability to retrieve recorded calls; audit calls for quality review, comply with established call center Service Level Agreements; have an editable scripted knowledge base and develop and execute a proper staffing plan which upholds Service Level Agreements during peak seasons/times.

Call Center must have Spanish speaking representatives and have the ability to answer other languages through interpreter services. Supplier is to have a dedicated (preferred) or designated (minimum) call center team to handle HISD benefits customer service issues (and life event changes if not part of automated system) as well as call-in enrollments and life event issues. Call Center hours should be no less than 7AM to 7PM central standard time. Call Center system should include a documented customer service representative manual including HISD rules and processes for handling customer service calls. It is strongly preferred that all calls be recorded

and retrievable. Customer Service unit supervisor is to be involved in weekly project team discussions (along with administration program team supervisor) with HISD Benefits Management to review all ongoing issues and maintain a weekly issues log.

Call Center must meet or exceed the following Call Center Metrics:

- Average Speed of Answer (Target 85%): percentage of employee calls to the participant service center with a speed of answer of less than 45 seconds. Speed of answer is defined as the time elapsed between an employee's call exiting the IVR system and the call being answered by designated call center personnel.
- Call Abandonment Rate: (Target <5%): percentage of calls ended by the caller due to the call not being answered by designated call center personnel within 65 seconds of exiting the IVR system.
- Average Handle Time (seconds): Establish a standard agreed upon with HISD
- First Call Resolution (Target > 80%) measures the percentage of calls resolved on the first contact to designated call center representatives
- Case Management Timeliness (Target >90%) measures the percentage of cases resolved within five days after receipt of all necessary information from third parties
- Inbound Census Data Input File (Target = 100%) -Percentage of inbound census data input files loaded into system within one business day of defined schedule

D. HIPAA Certificate Administration

- Track members whose medical benefits term with HISD
- Prepare, print and distribute Health Insurance Portability and Accountability Act (HIPAA) certificates of creditable coverage to individuals whose medical benefits term with HISD.

E. Life Insurance Beneficiary Designation Maintenance

- Establish an online tool to enable HISD employees to designate life insurance beneficiaries
- Run monthly query reports to identify employees with missing beneficiaries
- Mail and/or email reminder letters to employees missing beneficiaries
- Ability to generate monthly reports of beneficiary designations created and/or updated by call center representatives and/or administrators

F. Dependent Audits/Documentation

HISD requires documentation for dependents participating in one of the medical plans. System should include an electronic imaging of documents and flags in system denoting that status was verified and date of verification. Periodic auditing of dependent eligibility is also a requirement.

In accordance with HISD's Dependent Eligibility Rules, Dependent Audits should include:

- Multiple means of providing proof (fax, website/mobile upload, email, mail, etc.)
- Initial letters/emails to employees
- Monitoring grace periods
- File loaded into dependent eligibility system

- Reminder letters/emails
- Generate failure letters/emails
- Reports with list of dependents who failed audit
- Work with HISD to remove ineligible dependents
- Transmission of payroll files with updates
- Prepare, finalize and send list of ineligible dependents to carriers
- Managing appeals and untimely documents
- Process for handling discrepancies
- Dependent eligibility substantiation
- Ongoing dependent verification (combo audit)
- Combination audits should be triggered occur when life events occur to add, drop or change coverage and audit for proof of any dependents added to coverage at the same time.
- Inbound calls for all audits will be handled by vendor's customer service representatives
- Vendor will be responsible for reinstating coverage after appeal approval
- Vendor audit reports should be accessible to HISD via email and web
- HISD contacts that should receive access to the dependent eligibility external web

G. Full service ACA Administration

- Full ACA eligibility management
- Track and maintain ACA hours
- Feed data from the client's system
- Process to ensure data accuracy
- 1095-C and 1094 preparation and distribution including corrections and reprints
- Handling Marketplace appeals
- Prepare and distribute initial coverage notices

H. Advocacy Services

Supplier is to provide assistance to members in handling escalated benefit claim issues for all of the benefit plans offered by HISD.

- I. **Annual enrollment/Benefit Changes** - supplier is to administer all necessary rule changes for annual enrollment, including a major project plan to implement all aspects related to annual enrollment. Enrollment system will include a concurrent enrollment process for current year and next year enrollments. Vendor is to include a user-acceptance documentation process and web testing. Supplier will provide daily updates on enrollment activity. Depending on the need, an email reminder may be required and/or an activity report sent to location specific benefit coordinators. Supplier is to make all necessary carrier, benefit plan and rule changes as may be needed. Supplier is to hold an annual enrollment planning meeting in late May/early June, which is to be followed up with a detailed project plan and milestone dates. The project plan will be updated and maintained by Supplier. HISD would also like to consider new methods of benefit elections through the use of smart phones. Vendor's solutions should be customizable.

Additional Annual Enrollment Support include:

- Annual Enrollment Communications including Medicare part D Notices, creditable and non-creditable notices mailings, Go-Live emails, Annual Enrollment reminder emails, paper

Confirmation statements mailings, etc.

- Complete Annual Enrollment system configuration requirements
- Program, test, prepare and transmit all vendor and payroll output feeds and files
- Create and execute a plan to address employees who did not pass the dependent eligibility audit during the year, but need to update their Annual Enrollment elections for the next year
- Update all of HISD benefit plan rates
- Meet or exceed call center Service Level Agreements prior to, throughout and after Annual Enrollment
- Vendor should provide breakdown of all fees included in Annual Enrollment activities and disclose all optional fees

See attached **EXHIBIT 2: Life Event Matrix** containing HISD Life Event Matrix.

J. Urgent Enrollments

- Work directly with HISD carriers as needed to enroll HISD employees and/or dependents who are eligible for and need immediate access to health care via mutually agreed upon process with the carrier and follow-up with carrier via phone to ensure the enrollment is completed
- Contact the employee to confirm enrollment completed
- Log urgent enrollments in a case management tool and include notes on the cause of the urgent enrollment
- Provide a periodic report of urgent enrollment activities including details on which carriers were involved and the reason for the urgent enrollment

K. Comprehensive COBRA Administration and COBRA Annual enrollment

- New hire certifications
- Qualifying event notifications
- Election processing
- Direct billing including premium collections, account reconciliation, premium submission to HISD, invoicing and cancellations
- Coordination of eligibility and data to vendors
- COBRA Annual enrollment including creating and distributing packages; collecting and processing forms; updating premiums; invoicing; vendor data files; and eligibility management
- All member-related correspondence should be customizable

L. Preparation of Premiums Due Report

- Generate and send to HISD premiums due report in accordance with established schedule

M. Payroll Deduction Processing and Auditing

- Calculate per pay period deductions for each HISD employee, including imputed income for company-provided life insurance
- Audit and reconcile deductions to ensure accuracy

- Transmit biweekly benefits deductions file (change file) in an SAP-compliant format to HISD payroll administrator per frequency determined during implementation

See attached **EXHIBIT 3: Inbound Deduction File Layout** containing HISD file layout

N. Prepare, transmit, audit and reconcile vendor eligibility files

- Weekly transmittal of vendor eligibility files (full files, primarily 834 type)
- Ability to load historical data
- service for file transmission that utilizes enhanced authentication protocols, security and auditing.
- File transfers availability: on a 24/7, 365-day basis.
- Ability to customize files sent to vendors
- Support of multiple transmission protocols: HTTPS, HTTP, Web Service, Web Services/S, SSH, SFTP, FTP/SSL, FTP and AS2.
- Multiple transfer options: schedule jobs to automatically connect with MFT service to send or receive files.
- Vendor or clients can either push or pull files; web-access via well-known browsers with at a minimum 256-bit SSL; PGP and GPG Encryption support
- Anti-virus: Automatic scanning is done on all inbound/outbound files
- Email notifications when file delivery is completed or file is ready for pick-up and file failure notifications
- Validation testing environments available for pre-production testing purposes.
- Maintain an enterprise-wide information security program and has implemented administrative, physical, and technical safeguards that reasonably and appropriately protect the confidentiality, integrity, and availability of client confidential information including secure email.

See attached **EXHIBIT 4: IDF File Layout** containing HISD file layout

O. Extended Benefits

Vendor shall have capabilities to handle extended benefits. Less than 12-month employees who have completed their duty schedule or separation agreement have the option to select extended benefits upon their resignation (voluntary and involuntary). Extended benefits allow employees to receive benefits until the end of August instead of benefits being stopped on their last day of work. During the Voluntary Separation form processing, HR will change the "Benefit End Date" if the employee elected and is qualified for a benefit extension. Once the benefit reviews and updates if necessary, the employee's "Date Specifications" record will hold the Benefit End Date for use by Payroll and this interface. If a manual "Personnel Action" is created on the employee, the "Date Specifications" record will also be presented with the end of month (based on the resignation date) as default and the data entry person can update as appropriate.

Extended Benefits information is sent on the Individual Data Feed (IDF) to Vendor. The IDF interface determines extended benefits using Benefit End Date.

Based on the number of pay periods between the separation date and the extended benefits end date, Vendor includes the additional amounts by deduction code on the next deduction feed from Vendor to SAP. The SAP inbound interface from Vendor uploads the additional amounts into "IT0014 Recurring Deduction / Payments". This interface will create one file with multiple record types.

P. Benefits Appeals

Receive employee first-level, second-level and COBRA benefits appeal forms and supporting documentation; log form and supporting documentation into a workflow; review documentation to determine if appeal criteria is met; send appeal documentation and summary to HISD. Receive, document and process HISD's approval or denial. Update system accordingly.

Q. Employee communications materials including mail and email

- Prepare and distribute Benefits confirmation statements; dependent eligibility correspondence, etc.

R. Robust Reporting System – with standard and ad hoc reporting tools that allow HISD administration team to have access to the system.

Administration Reporting System

HISD administration and on-site support team are to have read-only access to the Benefits Administration system to see essentially the same information as the BCSR team supervisor. System should also include standard reports.

2.1.2 FULL-SERVICE LEAVE ADMINISTRATION SCOPE OF WORK: This service may be quoted and responded to separately. At a minimum, the District is seeking the following goods and/or services to be provided by the Supplier(s):

Full-Service Leave Administration

In consideration of HISD's unique leave programs, vendor shall have an automated absence management system that will manage the Application of leave process with employee and administrator online access. Please include a profile of the absence management system and the functionality.

Additional Vendor requirements include the following:

- Ability to convert current vendor's leave data into their system to manage the history, concurrent processing and any ongoing responses to the leave of absences currently approved by the existing vendor.
- Deliver training methodology and strategy for employees, supervisors/managers to deploy and transition the new leave of absence system and new processes.
- Develop and implement process(es) for managing leave eligibility (FML, military, sick, etc.)
- Vendor must be able to manage HISD's duty schedules (currently 12 schedules) which are attached in **EXHIBIT 5: Duty Schedule**
- Vendor must be able to incorporate HISD Duty Schedules in system setting
- Track and maintain leave hours
- Prepare and distribute leave letters to employees.
- Generate notifications to HISD stakeholders via secure email, workflow, etc.
- Vendor's system should allow HISD employees (and approved administrators) to perform the following actions for leaves:
 - Search for and view leave of absence information for any leave of absence on file with Vendor
 - Submit a new leave of absence request
 - Report intermittent time
 - View a calendar of absences on file with Vendor
 - View the hours used and available for the leaves for which employees are eligible
 - Access documents and forms
- Tracking of On-going Hours Worked Requirements include:
 - Hours worked should be sent per pay period
 - Hours adjustments from previous periods should adjust the summation
 - File will be received and loaded on a predetermined basis depending on the client's pay periods
 - File frequency will be based on the timekeeping cycle

File will be sent with an approved security transfer protocol and encryption method or file will be encrypted via the Vendor Secure FTP site.

2.4 COST:

Price is to remain firm/fixed for the term of the contract. Price is to be provided on Form F and inserted in Tab 7.

2.5 EVALUATION FACTORS: The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFP. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the

instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

If the evaluation committee has reasonable grounds to believe that the Proposer with the highest ranking score is unable to perform the required services to the satisfaction of HISD, HISD reserves the right to make an award to another proposer who in the opinion of the evaluation committee would offer HISD the best value. Some indicators (but not a complete list) of probable supplier/proposer performance concerns are: past supplier performance; the proposer's financial resources and ability to perform; the proposer's experience or demonstrated capability and responsibility; and the supplier's ability to provide a reliable on-going business relationship and the maintenance of on-going agreements and support.

Criteria #	Criteria Description	Weighted Value
1	the purchase base price	30 %
2	the reputation of the Proposer and of the Proposer's goods or services	10 %
3	the quality of the Proposer's goods or services	10 %
4	the extent to which the goods or services meet the District's needs	20 %
5	the Proposer's past relationship with the District	10 %
6	the impact on the ability of the District to comply with laws and rules relating to historically underutilized businesses	10 %
7	the total long-term cost to the District to acquire the Proposer's goods or services	5 %
8	for a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the supplier or the supplier's ultimate parent company or majority owner: (A) has its principal place of business in this state; or (B) employs at least 500 persons in this state	N/A
9	Tools and Access provided to HISD to manage the vendor and ensure all work is being done. Access to HISD information for analysis.	4 %

2.6 QUESTIONNAIRE: Please respond to the following questions in Appendix A and include in Tab 5 of the proposal response.

2.7 PRICING SHEETS INCLUDING ELECTRONIC SUBMITTAL REQUIREMENTS.

Proposer(s) are to complete the Attachment F Pricing and submit by electronic form (Excel format); handwritten proposals will not be accepted to complete this process. Proposers must include a USB flash drive properly labeled with company's name and project number, that contains the requested electronic catalog (electronic media supplied will not be returned and becomes property of the District).

HISD reserves the right to select and determine the appropriate and most advantageous suppliers for the above electronic catalog solutions. HISD requests all suppliers to consider the resources and skills necessary within their company to meet the electronic catalog requirements of HISD. These include, but are not limited to, ongoing catalog maintenance, customization of any current websites, and any new software needing to be purchased and implemented for successful catalog implementation and management. Additionally, HISD reserves the right to invoke corrective action, up to and including termination of the supplier's contract, in the event that suppliers cause technical problems with the catalog system or use the system inappropriately by selling unauthorized items or making price changes without the prior approval of the Procurement Services Department.