REQUEST FOR PROPOSALS FOR
HUMAN RESOURCES / PAYROLL SOFTWARE

Issued By:

Burke

Patricia Jelinek

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Date of Issue: October 30, 2018
Due Date: November 28, 2018

Request for Proposal Notice:
Burke requests proposals for the provision of a software package(s) to manage Human Resources functions, data and payroll functions.

Objectives:
Burke would like to offer your company the opportunity to become a possible and strategic vender to our organization. Burke would like to give each vendor the descriptive background of current requirements for Burke's HRIS solution requirements.

Background Information:
Burke is a local community center that provides award-winning mental health and intellectual and development disability services in 12 East Texas counties. Across our region, we operate 46 facilities that specialize in personal, professional and compassionate care for each and every client. Part of the East Texas healthcare community for 40 years, Burke employs more counselors, psychiatrists, and case workers than any other provider. We have approximately 425 full-time employees, 190 part-time employees and 140 client workers. For more information, visit www.myburke.org.

Requests for Proposals:
Proposals should be sent electronically. Proposals may be sent to 2001 South Medford Drive, Lufkin, TX 75901, Attention: HR Department. Proposals should be received by Patricia Jelinek no later than 5:00pm on November 28, 2018. Proposals shall take careful notice of the following conditions for this Request for Proposal:

> During the RFP response preparation period ending 5:00pm on November 28, 2018, no verbal/telephone requests for information will be accepted. You are encouraged to submit, via e-mail or by regular mail, questions, inquiries, and requests for clarifications to the contract named on the cover page.
>
> Burke reserves the right to accept or reject without consideration any proposal that does not fully address the requirements of the RPF or arrives at the designated address and contact after the proposal due date and time identified.
>
> Proposals cannot be altered or amended after submission deadline. Any alteration, or erasure made before opening time, must be initialed by the signer of the proposal, guaranteeing authenticity.

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

Proposal Documents Required:
The following documents and forms in the following arrangement must accompany each submission.

Cover Page: This is to be used as the first page of the submission. This form must be fully completed and signed by an authorized officer of the firm.

Executive Summary: This part of the response to the RFP should be limited to a brief narrative highlighting the proposer's qualifications and experience. Typically, this section should not exceed 2-3 pages. This section should include general information such as basic corporate information; average size client, and how you distinguish yourself from the competition.

Firm Information / Organization: The proposer must identify the Account Manager who will be working directly with and engaged in managing the work. Resumes must be included which reference the individual's qualifications and experience in managing similar projects. List relevant projects worked on, dates showing length of time spent on each project and the specific duties responsibilities for each project.

Identify the responsibilities of the key individuals, other than the Account Manager, who will be assigned to the proposed contract, and who will have major responsibilities for performance of the services required. Include resumes that list relevant projects worked on, dates showing length of time spent on each project and the specific duties and responsibilities for each project.

Burke reserves the right to approve or disapprove any change to the successful Proposer's Account Manager. Personnel changes that impact the contract may result in the cancellation of the contract.

Firm Experience: The proposal shall include references from past and current government entity clients for similar types of payroll services:

Client (contact person, address, telephone #, fax # and email)
Date contract stared to date completed (if applicable)
Nature of work for each contract (include all applicable modules / work processes)

Cost Proposal: The Cost Proposal must provide a detailed fee schedule including itemized services. The proposal must state clearly whether the costs are for a month subscription type product (ASP model) or in-house software including (but should not be limited to) the following:

- Monthly rates for regularly schedule activities and help desk support.
- Labor costs, administrative costs, equipment and materials, and sub-consultant or consultant team costs.
- Center staff training and implementation costs.

- A fee schedule for emergency and /or after-hours service calls also required.
- Specify price structure breakdown (e.g., based on number of employee 1-100 employees, 101-200 employees, etc.) as well as the cost per employee.
- If a specific requested service, function, or option is not offered / available please indicate.
- Indicate the frequency of cost (e.g., per payroll process, monthly, quarterly, annually, as required).
- Provide any one-time costs or costs that are not based on the number of employees.
- Include any general comments on pricing, or different levels of service.
- List software licensing fees if applicable.
- List charges for "special payroll reports" created by the vendor if applicable.
- It is expected that all proposers responding to the RFP will offer government or comparable most favorable rates. Any and all discount offers must be clearly delineated.

Cost proposal shall list each module / function separately and should include all purchase and implementations costs. Burke may choose to implement all modules, one module, or any combination thereof. While the proposer may choose to offer additional discounts or cost savings for the initial purchase of all modules / functions combined. Burke reserves the right to purchase modules / functions individually. In addition, all prices must be firm and fixed for at least one (1) year following the notice of the award.

Vendor Questionnaire: Answers to questionnaire will be used in Burke's evaluation of proposal.

Firm's Current Workload and Schedule: Provide information supporting firm's ability to perform in a timely fashion. Present workload of key personnel assigned to this project. Indicate that the personnel listed in the submittal shall be available for and assigned to Burke based on illustrated workload. Indicate firm's ability to meet budget and schedule. It will be important to limit response to similar projects based on current and near future workload.

Sub-consultants / Subcontractors: Contractor shall submit a list of sub-consultants and subcontractors. No substitutions shall be made without prior written approval by Burke.

Intangibles: Describe any significant or unique accomplishments or awards for work performed for similar agencies. Provide any additional information which may be relevant to the evaluation of your submission relative to Burke's project.

Litigation: Please list any past and / or pending litigation or disputes relating to the work described herein, that the firm has been involved in within the last five (5) years. List shall include project name, nature of litigation and outcome of litigation (if resolved).

Licenses: Firm shall submit proof of licensing as may be required by local, state, or federal agencies perform the required work.

Proposal Forms:

- Proposal Cover Page
- Exceptions or Deviations Form
- IRS W-9 Form

Examination of Proposal Documents: Each vendor shall carefully examine the Specifications and other applicable documents, and inform himself / herself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress or performance of the work to be performed under the Contract. Ignorance on the part of the Contractor will in no way relieve him / her of the obligations and responsibilities assumed under the Contract. Should a vendor find discrepancies or ambiguities in, or omissions from the Specifications, or should he / she be in doubt as to their meaning, he / she at once notify Burke, in writing by email to tricia.jelinek@myburke.org.

Changes / Modifications: Burke reserves the right to order changes in the scope of work and resulting contract. The successful Proposer has the right to request an equitable price adjustment in cases where modifications to the contract under the authority of this clause result in increased costs to the contractor. Price adjustments will be based on the unite prices proposed by the Contractor in response to this solicitation. Any contract resulting from this solicitation may be modified upon written and mutual consent of both parties.

Evaluation and Selection Criteria: Each proposal received must adhere to the instructions, forms / content, and specifications. This will ensure that evaluation criteria can be systematically applied to all Vendors. The major criteria categories for selection and evaluation are listed:

- Satisfactory completion of all required responses
- Extent to which Vendors proposed solution fulfills Burke's stated requirements as set out in this RFP
- Assessment of Vendor's ability to deliver indicated service in accordance with specifications set out in this RFP
- Completeness of solution
- Configurability for unique organizational characteristics
- Proposed project plan for transition, implementation, and integration of proposed solutions to Burke's business model
- Most competitive ROI coupled with Best Value proposal

Final Selection and Award: Burke will notify each participating vendor of the selection / approval or rejection of all or a portion of their proposal. This decision will be a final decision for awarding services under the RFP. Burke reserves the right to reject any, portions of, or all proposals without giving reason for the reject, and to award a contract or contracts to the bidder of their choice. The resulting contract will be approved by Burke Board of Directors.

Payments: Payments shall be made 30 days from the receipt of invoice, and follow all Center policies promulgated thereby.

Indemnification: The successful Proposer must fully indemnify Burke. Such indemnifications will be documented in the contract documents.

Additional Terms and Conditions: No additional terms and conditions included with the proposal response shall be evaluated or considered and any and all such additional terms and conditions shall have no force and effect and are inapplicable to this proposal. If submitted either purposefully through intent or design or inadvertently appearing separately in transmitting letters, specifications, literature, price lists or warranties, it is understood and agreed the general and special conditions in this solicitation are the only conditions applicable to this proposal and the Proposer's authorized signature affixed to the proposal attests to this.

Proprietary Information: Responses to this Request of Proposals, upon receipt by Burke, become public records. If any proposer believes that any portion of all of the response is confidential and proprietary, proposer shall clearly assert such exception and the specific legal authority of the asserted exemption. Such designation of material submitted to Burke as a "trade secret", the proposer agrees to hold harmless Burke for any award to a plaintiff for damages, costs or attorney's fees and for costs and attorney's fees incurred by Burke by reason of any legal action challenging the proposer's "trade secret" claim.

PROPOSAL COVER PAGE

Name of Firm, Entity or Organization: ____

Federal Employer Identification Number (EIN):_____________________________________

State of Texas License Number (If Applicable):_____________________________________

Name of Contact Person: ____

Title: ____

E-Mail Address: ____

Mailing Address: ____

Street Address (if different):____

City, State, Zip: ____

Telephone: ___________________________________Fax:______________________________

Organizational Structure – Please Check One:

_____ Corporation _____ Partnership ____ Proprietorship ____ Joint Venture _____ Other

If Corporation:
Date of Incorporation: ______________________ State of Incorporation: _______________

States Registered in as Foreign Corporation: _______________________________________

Authorized Signature: ____

Print Name: ____

Signature: ____

Title: ____

Phone: ____

EXCEPTIONS OF DEVIATIONS TO SPECIFICATIONS

( ) Proposer understands and agrees to all terms, conditions, requirements and specifications stated herein.

Firm: ____

Signature: ____

( ) Proposer takes exceptions to terms, conditions, requirements or specifications stated herein. (Proposer must itemize each exception below and return with the Proposal Form.)

Firm: ____

Signature: ____

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Proposer should note that any exceptions taken from the stated terms and / or specifications may, but not necessarily will be cause for their submittal to be deemed “non-responsive”, risking rejecting of the submittal.

This document must be completed and returned with your Submittal

VENDOR QUESTIONNAIRE

Proposer must include in response to questions complete information about proposer's company and its ability to perform the requested services as described in the Scope of Work.

General Information

1. Identify your company name and headquarters, along with the name and headquarters of your parent corporation, if applicable. Provide address, main phone number and website URL.
2. Provide a brief overview of your company and history of your organization.
3. What is the core product of your business?
4. What separates your product from the competition?
5. What are your major industry market areas? Describe the types of industry customers you serve.
6. What is the projected growth and development of your company?
7. Please identify the solutions you are proposing.
8. How do you sell your proposed solution (e.g. ASP, Vendor-hosted, customer-hosted, etc?)
9. Is the proposed solution cloud-based?
10. What is the total number of active clients that use the proposed solution?
11. Estimated completion period for this project.
12. What is your average size of your customers?

Product Functionality

1. Describe how your solution acts as a unified solution for HCM and Payroll (Is system a single database or a series of integrated modules?) Include number of separate databases if applicable.
2. Does your solution have an intuitive, user friendly interface? Please explain
3. Does the solution have the ability to support employee self-service functionality so that employees can view and manage their own personal data, provide access to compensation and benefits data and provide updated balance and accrual details for time off policies? Please explain.
4. Describe how the software facilitates the maintenance of employee data and creation of employee history.
5. Is manager self-service functionality provided so that managers can easily view important metrics, address workflow items, view applicants, approve time sheets, and more?
6. Does the system alert managers to items that require their attention or approval? (job changes, credential compliance, late timesheets)?

7. Does the system support employee acknowledgement that can be electronically acknowledged, downloaded, and/ or stored in an electronic employee file?
8. Does the system maintain an auditable electronic employee
9. Does the solution support the tracking and management of company property issued to employees?
10. Does the solution provide a compensation structure that can be defined by us and is configurable?
11. The system must provide standard capabilities to model and report on organization, location, general ledger and reports to structure. Is integration with map functionality provided?
12. Does the system allow for temporary delegation of manager responsibilities for vacation coverage (e.g.)?
13. Does the system provide support for multiple kinds of workers: full time, part time, and contractors?
14. Does the system allow for effective date tracking for key position and employee data?
15. Describe the workflow capabilities within your system including the automation and the degree of configurability available.
16. Is there any limit to the number of approvals that a workflow can go through?
17. Does you workflow capability support the ability to define approvers by role or reports-to relationships?
18. Does your workflow capability send emails to approvers to inform them that they have a task requiring their attention?
19. Can users cancel pending workflows?
20. Does your workflow capture audit details about the change being processed and who approved the change?
21. Is there a reporting interface with the ability to view, export and print reports with differing formats (e.g. PDF, Excel)?
22. Can the system track disciplinary actions and outcomes?
23. Does the system maintain OSHA logs?
24. Does the system manage and track workplace incidents?
25. Does the system manage and track EEO information?
26. Can the system track performance management cycles dates (30 day, 90 day, annual, etc?)
27. Can the solution be configured easily?
28. Does your solution require multiple logins for different modules?
29. Does the system support and create an organizational chart within the platform? If so, is the organizational chart actionable? Does it integrate with manager self-service?
30. How are positions maintained in the system?
31. What information associated with the employee is controlled by the position?
32. What are the system rules for calculating FTE’s?
33. How does your HRIS/Payroll system support multiple companies?
34. How does the system handle acquisitions and mergers? Specifically, what is required to add a new company to the system?

35. In the system accessible via mobile? If so, what devices? Describe the extent of the functions provided on the mobile version.

Time and Attendance

1. Is the Time and Attendance system part of a unified HCM and Payroll system or a separate database? Please explain the integration method.
2. Please describe the solution's capabilities to manage time off administration, self-service for time off requests and approvals.
3. Does the system support web time entry (no proprietary clocks)? If so, how is employee location verified when clocking in and out?
4. Does the system allow for the transfer between job codes and departments?
5. Does the system provide online employee and manager attestation?
6. Does the system provide dashboard views of time and entry to address missed punches and/or missing items?
7. Can the system produce real-time labor analytics? Please explain.
8. Can the system support matrix approvals for employees working in multiple departments?
9. Can you configure reasons for taking time off? (e.g. vacation, sick, jury duty, etc.)
10. Does the system automatically calculate employee balances?
11. Can you correct time off balances for a given employee?
12. Can employees view approved time off, time taken, and time off balances remaining?
13. Will the system provide alerts based on vacation, sick leave balances? (negative, approaching zero, have not taken leave this year, etc.)
14. Will the system provide alerts to managers for missing punches, no punches, off schedule, etc.?
15. Does the system provide full employee attendance history?
16. Can the system support multiple pay groups?
17. Describe how the system supports the allocation of labor between departments for distribution of wages.
18. Describe how the system provides and manages role-based security throughout the platform?
19. Does the system maintain an audit trail/reports for all punch data changes?
20. Does the system allow for comments to be attached to the employee record?
21. Can the system required comments or reason codes for punch data changes?
22. How long is time data stored in the system? Is it purged after a certain date range?
23. Does the system allow for employees to request time off in the future to be approved by their supervisor?

Benefits Administration

1. Is the Benefits Administration function part of a unified HCM and Payroll solution or a separate database? Please explain the integration method.
2. Does the system allow for benefits analysis reporting? (By benefits group, benefit type, benefit plan, coverage type with employee and employer paid amounts, etc.)
3. Please describe the functionality provided for open enrollment (i.e. is it web based? Can employee utilized self-service to enroll, is the enrollment interface easy to use, etc?)
4. Does the system provide email messaging to employees?
5. Describe your system's ability to track and administer qualifying life events and available changes automatically?
6. Does the solution provide carrier integration to benefits providers, providing an automated process for sharing enrollment details from the system?
7. Does the system maintain active carrier connectivity?
8. Can the system support bill reconciliation and audit reporting?
9. Does your solution provide features for benefits administration? The ability for benefits administrators to easily track, launch and manage enrollments across the organization; configure eligibility requirements and set up benefits plans and options must be available.
10. Describe the types of benefit plans your system supports.
11. Describe the types of eligibility criteria that can be configured for benefit plans in your system.
12. Does your system charge extra for benefits administration or carrier integration?
13. Does your system send automatic benefit deductions calculations information each payroll run without manual intervention?
14. Does the system support accrual management for missed deductions?
15. Does your system track and maintain employee data on dependents and beneficiaries?
16. Describe how your system provides employee benefits summary statements.
17. Does your system display employer costs per plan as well as employee costs? Is this configurable?
18. Does the system support EOI tracking and notification?
19. Can the system provide support for fully insured and self-insured programs?
20. Explain how the system aids PPACA Compliance. Are specialized monitoring tools and reporting functions included?
21. How does the system accommodate a mass change/update such as health insurance premium change?

Reporting/Workforce Analytics

1. Describe the proposed system's Workforce Analytics capabilities in detail.
2. Are there standard reports within the solution? Is so, please list.

3. Does the system provide an ad-hoc report writer? If so, does it include all fields in the data dictionary?
4. Is the report writer designed for ease of use? Describe how a non-technical user can create reports without IT assistance.
5. Does the system provide dashboard analytics views for managers, administrators, and executives? Please explain.
6. Do reports and dashboards feature drill-down capabilities?
7. Can the system support multiple options for output? (.xls, .cvs, .pdf. etc.)
8. Does the system provide point-in-time reporting? Please explain.
9. Is all historical data in the system reportable? Please explain.
10. Are government reports available? (OSHA, EEO, VETS, New Hire, etc.)
11. Does the system support cross-domain reporting? (Payroll data with Benefits data, e.g.)
12. Does the system support a combination of historical and current data in the same report? (i.e. transfer “From”and “To”)
13. Do you offer data aggregation across multiple systems (GL, EHR/EMR, HR, Payroll, etc.)

Recruiting Management

1. Describe the proposed solution’s Recruiting Management capabilities in detail.
2. Does the system allow for a hiring manager or recruiter to create a new requisition using a requisition wizard?
3. Does the system provide vacancy report for administrators and managers with the ability to calculate daily lost revenue for open positions?
4. Can the system allow us to select desired sourcing channels such as internal job postings, specific job boards, external search firms, etc.?
5. Does the system provide job board syndication?
6. Can the system electronically route requests for requisitions to the correct approver?
7. Does the system allow for the creation of multiple job openings from a single requisition?
8. Does the system allow users to preview job postings prior to posting on a company website and/or external job boards?
9. Does the system feature a dashboard (or similar view) for Hiring Managers to see the status of their job requisitions?
10. Describe how recruiters can view the status of requisitions at any time throughout the recruiting process
11. Once the requisition has been closed and filled in the system, will the solution automatically remove job postings from all sources including internal job posting, company web site, external job boards, etc?
12. Does the system allow candidates to create and update their own profile on the company career site and apply online for multiple jobs without filling out separate profiles?

13. Can the system prevent duplicate submission of applications for the same job from the same candidate?
14. Describe how the system can administer online qualification questions to candidates (knock out questions). If not minimally qualified according to our specifications can the candidate be automatically disqualified, immediately notified, and re-engaged to view other openings?
15. Describe how the system notifies recruiters and/or managers of new candidates who apply to an open position. IS this displayed on an easy-to-view dashboard?
16. Describe the processes for tracking interviews and assessment results within the solution. Who is allowed to view an applications progression through the process? Is this configurable?
17. Does the solution provide Correspondence Management including automated letters that can be mailed and/or emailed to the candidates?
18. Does the solution handle the offer management process, including automated letters that can be mailed and/or emailed to the candidates?
19. Using the solution, can candidates accept electronic offer letters through electronic signature capabilities?
20. Please explain the unification of data for Applicant Tracking and Core HRIS (unified database preferred. Please note if integrated)
21. Does the system support onboarding activities? Please explain
22. Will the system provide automated completion and tracking of onboarding forms electronically? Please explain.
23. Does the solution provide electronic onboarding documents to employees and managers automatically for completion? (New Employee Checklist for Manager, relocation and benefits information for New Hire, primary source licenses/certificates, and the new hire orientation tracking)
24. Can the system send notifications to internal departments for New Hire and provide data needed to initiate appropriate access?
25. Describe the system process for collecting I-9 information electronically.
26. Does the system have the ability to produce standard reports including open requisitions, pending requisitions, 30-60-90 day aging, filled, source, etc.?
27. Does the system provide an on-line report writer tool that will produce custom reports as specified by a non-technical reporting administrator?

Performance, Talent, Learning Management

1. Does the proposed solution include performance management module? Is it part of a unified HCM and Payroll solution or is it a 3rd party application? Please explain.
2. Describe how the system facilitates the performance management process (annual, 30-day, ad-hoc, etc.)
3. Does the performance management solution support both manager and self-appraisal capabilities?
4. Can the system allow users to view performance history?
5. Can goals be assigned to both teams and individuals?

6. Does the system support the ability to rate and review competencies?
7. Does the system allow for the creation and tracking of development plans?
8. Describe how the solution supports the assigning and managing of performance objectives.
9. Can the solution generate alerts/notifications and email notifications for the performance cycle process?
10. Can performance appraisals be attached to an employee file?
11. Does the proposed solution include Talent Management module? Is it part of a unified HCM and Payroll or is it a 3rd party application? Please explain.
12. Does the Talent Management solution support uploading and tracking of credential compliance information for education, skills, fitness, licenses, registrations?
13. Does the proposed solution include a Learning Management module? Is it part of a unified HCM and Payroll or is it a 3rd party application? Please explain.

Payroll

1. Describe the proposed solution's payroll feature. Is it part of a unified HCM and Payroll solution or is it a separate database?
2. Describe the integration between Payroll solution and General ledger. Is it tailored with client-specific chart of accounts and GL format?
3. Is the proposed Payroll solution web-based?
4. Is the proposed Payroll solution rules based? Please explain.
5. Does the solution support payroll preview analysis? (the ability to preview and audit payroll prior to processing)
6. Does the solution facilitate and manage garnishment processing?
7. Can the solution provide new hire reporting?
8. Can the solution produce online pay statements and W2's?
9. Describe the process for printing and distributing live checks and DDAs (Demand Deposit Account)
10. Describe the process for producing manual and off-cycle checks.
11. Does the system support the management of earnings and deductions? Please explain.
12. Does the system support vacation, sick leave accrual management and communication? (paystub, online, etc.)
13. Does the system process automatic tax filings and legislative updates? Please explain.
14. Does the system have a gross-up calculator built in?
15. Can the system manage and provide role-based security throughout the platform?
16. Can the system process supplemental payrolls at anytime? Please explain.
17. Does the system support automatic FLSA calculations and compliance? Can it handle middle of the week pay changes and prorated workweeks (32.5, 35, 38 hours, etc.)
18. Are check registers available prior to final submission? Do they include gross-to-net results?
19. Can the system support multiple direct deposit destinations per employee? Please explain.

20. Describe how the system handles secondary pay rates.
21. Describe how the system handles labor allocation.
22. Can the system produce labor allocation reports?
23. Are there limits to the number of earnings codes that can be established in your system and used per individual employee?
24. Does the system use Position Control allowing position attributes such as allocations, organizational dimensions, reporting structure, job information, FLSA status, employment status, corporate level and productivity to be tracked by position versus by employee?
25. Does the system support multi-dimensional reporting by company, program, cost center, funding source, location etc. if needed?
26. Describe how the system supports the budgeting process.
27. Does the proposed solution have the ability to produce and review audit trails for any changes made within the system?
28. Describe how the system handles the tracking and management of arrears that occur when deductions are greater than earnings.
29. Describe how the proposed system handles employee with multiple rates of pay and department or cost center assignments. How would employees with multiple jobs or positions be handled?
30. Describe how your system recognizes overtime for employees who work across various divisions or companies within the same workweek.
31. Describe how your system manages bonus pay, incentive pay and shift differentials.
32. Explain how pay changes are entered in the system.
33. Does the proposed solution validate minimum and maximum salary (of grade) when pay is changed, and provide warning messages as needed?
34. Describe integration between Benefits and Payroll. When a change is made to an employee's benefits election, how does the deduction amount get changed in Payroll?

Tax Services

1. Describe the tax resources provided to your customers on a tax regulations at the federal, state, and local levels? How do your customers access this information?
2. What tax updates, if any, are provided and how are these updates received?
3. Describe how your system can accommodate consolidated tax returns for multiple companies.
4. Do you provide full tax filling processes?
5. Does the system allow for a Payroll administration user to generate an employee W-2C?
6. Does your company provide annual W-2 print services?

Training and Support

1. Describe the proposed approach to training, the type of personnel to be trained, and the location.
2. Do you have provide training directly or through a third party?
3. Can training be delivered remotely via web conference?
4. Do you provide support for multiple browsers? (IE, Chrome, Firefox)
5. How are changes made in the system? Is the system configured or customized?
6. How can we configure the system to match our workflows? Can we make the changes ourselves or will we need to put in a request and wait for completion?
7. Describe any limits to the proposed systems scalability.
8. Is you proposed software solution "versionless"?
9. Will updates be instantaneous?
10. How are the various pieces of your software connected? If your product's features and functions were created from different acquisitions, how well do they work together?
11. Does the software offer a consistent user experience and interface or does it change from module to module?
12. Do separate products or functions require different support teams?
13. Can consistent reports be generated by every part of the system? Are reporting toll standardized across the system?
14. How are product upgrades and enhancements impacted if the system is pieced together? How are these different versions standardized and unified throughout the software suite?
15. If the solution is pieced together, how does this affect administrators or in-house IT support teams?
16. How do you determine and prioritize changes in your system?

Implementation

1. Provide a high-level project timeline that describes how you see Burke's implementation of your solution proceeding. Include major milestones and key deliverables that will be generate during the project.
2. Describe the type of resources that would be assigned to this project.
3. Describe the type of Burke resources you would expect to be assigned to the implementation project.
4. Are your implantation resources employees of your company or contract resources?
5. Does your solution support data from Burke's HRIS? How will the data be migrated?
6. During the implementation process, do your consultants assist with process improvement and/or best practices?
7. What is your process from moving from implementation to customer support?

Solution Technical Requirements

1. Is your solution developed internally, leased, or purchased from another provider?
2. Is hosted by a 3rd party provider, who is the vendor?
3. How often is the solution updated?
4. Describe the system enhancements you have planned over the next year.
5. Describe your documented disaster recovery plan.
6. Describe your maintenance and backup procedures including daily backups, retention timetable, and off-site backup storage approach. Where are your off-site backup facilities located?
7. Describe your hardware/software requirements, including operating systems, databases, and browsers.
8. Does your solution use role-based access? If yes, please describe the roles and persmissions.
9. What is the process for data breach notifications?
10. Describe the audit trail and historical activity tracking functionality.
11. Does your solution have a password complexity policy?