



**STATEMENT OF QUALIFICATIONS  
FOR**

**Human Capital Management (HCM) solution**

**SOQ NUMBER: 26-021**

**ISSUED:** Thursday, June 18, 2026

**DUE DATE:** Tuesday, July 21, 2026 11:00 am

Genesee Health System 1040 W. Bristol Road, Flint, MI 48507

## TABLE OF CONTENTS

### Contents

1.	ORGANIZATION OVERVIEW & OBJECTIVES.....	4
1.1.	Organization Background .....	4
1.2.	Business Objectives.....	4
1.3.	Key Stakeholders .....	4
1.4.	Opportunity .....	4
2.	SCOPE OF WORK .....	4
2.1.	Applicant Tracking System (ATS).....	5
2.2.	Onboarding.....	5
2.3.	Performance Management & Development.....	5
2.4.	Compensation & Payroll Processing .....	5
2.5.	Timekeeping & Scheduling.....	6
2.6.	Reporting & Analytics .....	6
2.7.	Employee & Manager Self Service Portal .....	6
2.8.	Core HR Management .....	7
2.9.	Accounting & System Integrations .....	7
2.10.	Expense Management.....	7
2.11.	Benefit Management .....	7
2.12.	Technical Validation and Integration Requirements.....	7
2.13.	Pricing Model & Structure (informational only).....	8
2.14.	General Requirements and Standards .....	9
2.15.	Term.....	9
3.	SOLICITATION REQUIREMENTS .....	9
3.1.	DATE AND TIME REQUIREMENTS.....	9
3.2.	GENERAL FORMAT.....	10
3.3.	SUBMISSION REQUIREMENTS.....	10
3.4.	SUBMITTAL FORM TEMPLATES .....	10
3.5.	Qualifications Format and Submission .....	11
4.	EVALUATION PROCEDURES .....	12
4.1.	EVALUATION CRITERIA.....	12

4.2.	EVALUATION PROCESS.....	12
5.	ADMINISTRATIVE REQUIREMENTS .....	13
5.1.	QUESTIONS, INQUIRES, CLARIFICATIONS, REQUESTS FOR INFORMATION.....	13
5.2.	PURCHASING CONTACT.....	13
5.3.	ADDENDA.....	13
6.	SUBMISSION FORMS .....	13
7.	STANDARD TERMS & CONDITIONS .....	21
7.1.	COST LIABILITY .....	21
7.2.	OTHER MATERIALS.....	21
7.3.	AWARD OF CONTRACT .....	21
7.4.	DISCLOSURE.....	21
7.5.	CONFLICT OF INTEREST.....	21
7.6.	RELATIONSHIP OF THE PARTIES (INDEPENDENT CONTRACTOR) .....	21
7.7.	NO WAIVER OF DEFAULT .....	22
7.8.	DISCLAIMER .....	22
7.9.	ASSIGNMENT and SUBCONTRACTING .....	22

# 1. ORGANIZATION OVERVIEW & OBJECTIVES

## 1.1. ORGANIZATION BACKGROUND

Genesee Health System (GHS) is a public service provider serving individuals with mental illness, intellectual and developmental disabilities, and substance use disorders. In addition, GHS provides primary care services through its Federally Qualified Health Center (GCHC). GHS currently has approximately 685 staff and is growing rapidly.

## 1.2. BUSINESS OBJECTIVES

GHS is seeking a comprehensive Human Capital Management (HCM) solution that will:

- A. Support a diverse workforce with multiple employee groups
- B. Accommodate unique work rules, pay structures, and scheduling requirements by employee group
- C. Improve operational efficiency, compliance, and data accuracy
- D. Enhance the employee and manager experience
- E. Provide scalability and flexibility for future organizational needs

## 1.3. KEY STAKEHOLDERS

The system will be evaluated and selected by a cross functional project team consisting of Human Resources, Payroll, Finance, Information Technology, and executive leadership.

## 1.4. OPPORTUNITY

Selection of the awarded firm will be the result of a two phase process. The first phase will be the review of the submitted SOQ. An Evaluation Committee will be assigned to review and score the SOQ based on the criteria established in this SOQ. The Committee will establish a shortlist of not less than three (3) firms deemed to be the most qualified. At the discretion of the Committee, they may request oral presentations, or additional information for clarification from the offeror. During the aforementioned procedures, neither the names of any of the offeror nor the contents of any submission will be disclosed until the completion of recommended award of submission.

For the second phase, after the demonstrations by the shortlisted firms, and/or any addition information requested has been evaluated. The Committee will make recommendation for which firms will be provided the final Request for Proposals (RFP) to submit a sealed proposal and cost proposal for an HRM solution. The Board intends to enter into a contract with an entity to provide Human Capital Management (HCM) and payroll solution that delivers an integrated, user-friendly platform to support the full employee lifecycle.

# 2. SCOPE OF WORK

GHS is seeking a comprehensive Human Capital Management (HCM) and payroll solution to replace its current system with a more comprehensive, innovative system that delivers an integrated, user-friendly platform to support the full employee lifecycle. The selected system should streamline HR, payroll, talent acquisition, workforce management, and reporting processes while improving operational efficiency and the employee experience.

The solution should be scalable and secure, which enhances operational effectiveness, improves data accuracy, supports compliance requirements, and promotes a positive employee experience across the organization, with the following capabilities:

## 2.1. APPLICANT TRACKING SYSTEM (ATS)

The solution must support end to end recruiting, including:

- A. Job posting and applicant management
- B. Electronic applications
- C. Interview scheduling and communication tracking
- D. Hiring analytics
- E. Configurable recruiting workflows and approval processes
- F. Automated notifications and candidate status updates
- G. Integration with onboarding and Core HR modules

## 2.2. ONBOARDING

The onboarding module must support electronic onboarding and document management, including:

- A. Collection and tracking of required pre-employment documentation :
  - a. Background checks
  - b. Drug testing tracking
  - c. Professional licenses and certifications
  - d. College transcripts
  - e. Reference checks
- B. Configurable onboarding workflows by employee group
- C. Automated alerts, reminders, and task assignments for HR, managers, and new hires

## 2.3. PERFORMANCE MANAGEMENT & DEVELOPMENT

The solution should include tools to support:

- A. Goal setting and performance tracking
- B. Performance evaluations and review cycles
- C. Employment development tracking including performance improvement plans, disciplinary actions.
- D. Learning and development management capabilities
- E. Configurable workflows and automated reminders for evaluations and approvals

## 2.4. COMPENSATION & PAYROLL PROCESSING

The payroll solution must support complex compensation and payroll requirements, including:

- A. Multiple compensation structures by position and employee group
- B. Merit increases and pay adjustments (including retroactive adjustments)
- C. Shift premiums
- D. Longevity pay with:
  - a. Multiple eligibility rules
  - b. Milestone based payouts
- E. Multiple pay codes (i.e. bereavement, PTO, holiday, FMLA, etc.)
- F. Voluntary and involuntary (garnishment) deductions
- G. Pretax vs. post tax deductions
- H. Ability to support 26 annual pay frequency (every 2 weeks) and ability for special pay runs (i.e. bonus)
- I. Automatically add Holiday Banked as well as other flexible holiday hours to employee banks based on their schedule (8, 10, 12 hours etc.)

- J. Easily add Supplemental Pay as needed – shift pick-ups, Doctor On Call, Retro pay, Bonuses, Severance Pay, and Payoff when employees terminate
- K. Special wage adjustments for individual employee types
- L. Ability to process PTO buyouts to various options, i.e. direct deposit, check, retirement accounts, etc.
- M. Allows for easy cost center changes on the timecard during daily work activities
- N. Easily process payroll corrections as needed
- O. Ability to handle complex PTO accruals based on seniority
- P. Allows for easy review and adjustment of PTO accruals as needed
- Q. Allows for an efficient method for deducting reimbursements from employee's gross pay
- R. Direct Deposit processing
- S. Tax administration
- T. W-2 processing
- U. Configurable payroll workflows and automated alerts
- V. Compliance with applicable public sector payroll regulations

## 2.5. TIMEKEEPING & SCHEDULING

The time and attendance module should support:

- A. Shift scheduling with customization by employee group
- B. Multiple clock in and clock out methods
- C. Automated lunch deductions
- D. Overtime tracking with configurable rules
- E. Compensatory time tracking and accrual rules
- F. Ad hoc and last minute schedule changes
- G. Tardiness tracking and rule enforcement
- H. Automated alerts and exception reporting

## 2.6. REPORTING & ANALYTICS

The solution should provide robust reporting and analytics capabilities, including:

- A. Real time workforce, payroll, and timekeeping data
- B. Customizable dashboards for HR, leadership, and finance
- C. Standard and ad hoc reporting tools
- D. Automated alerts for exceptions, thresholds, and compliance risks
- E. Ability to create reports or have assistance with complex reports – reviewing payroll, management reports, payroll preview reports, etc.

## 2.7. EMPLOYEE & MANAGER SELF SERVICE PORTAL

The system should include an intuitive self-service portal that allows employees and managers to:

- A. View and update personal information
- B. Access pay statements, tax forms, and PTO balances
- C. View/Update tax withholdings, HSA, dependent care deductions, retirement deductions etc.
- D. View/Update payment options/bank account information(checking, savings)
- E. Benefits management including open enrollment and dependent request changes
- F. Mobile friendly and self-service access capabilities
- G. Submit and approve time, leave, and workflow requests
- H. Receive automated notifications and alerts

## 2.8. CORE HR MANAGEMENT

Core HR functionality should include:

- A. Centralized employee records
- B. Employee directories
- C. Personal profile information including home address, emergency contacts
- D. PTO and leave tracking
- E. Key date tracking such as hire date, position date, seniority dates
- F. Role based security and audit trails

## 2.9. ACCOUNTING & SYSTEM INTEGRATIONS

The solution should support:

- A. Integration with existing accounting and financial systems
- B. Secure data exchange between HR, payroll, timekeeping, and finance
- C. Vendor supported integrations or standard APIs

## 2.10. EXPENSE MANAGEMENT

The solution should support:

- A. Electronic submission and approvals
- B. Reimbursement tracking
- C. Receipt management and efficiencies
- D. Policy verification at time of entry (meals, mileage rules, etc)
- E. Easy reporting and summarization by cost center and by employee.

## 2.11. BENEFIT MANAGEMENT

The solution should support:

- A. New hire enrollment
- B. Open enrollment
- C. Carrier integration
- D. ACA compliance
- E. Configurable workflows and approval chains

## 2.12. TECHNICAL VALIDATION AND INTEGRATION REQUIREMENTS

- A. Integration Architecture (Required):
- B. Vendors must provide a detailed integration architecture diagram (not marketing material)
- C. Clearly define supported methods (APIs, file-based, webhooks)
- D. Identify real-time vs. batch capabilities and data formats
- E. Outline any middleware dependencies
- F. Data Ownership & Access
- G. GHS retains full ownership of all data
- H. Ability to export data on demand in standard formats
- I. Access to audit logs and raw data (no proprietary lock-in)
- J. Versioning & Change Management
- K. Document API versioning strategy
- L. Define advance notice for changes (e.g., 90–180 days)
- M. Provide sandbox/testing access prior to production updates
- N. Testing & Implementation

- O. Provide a formal test plan approach (integration testing, UAT, etc.)
- P. Define vendor vs. client responsibilities
- Q. Include sample test scripts/templates
- R. Provide a dedicated test environment
- S. Outline data migration validation process
- T. Security & Compliance
- U. HIPAA-aligned controls and willingness to sign a BAA
- V. Encryption at rest and in transit
- W. MFA, role-based access controls, and audit logging
- X. Security certifications (e.g., SOC 2)
- Y. Identity Integration
- Z. Support for SSO (SAML/OIDC) and integration with Microsoft Entra ID
- AA. Automated user provisioning/deprovisioning (SCIM preferred)
- BB. Reporting & Data Integration
- CC. Ability to integrate with our reporting/data environment
- DD. Support for scheduled and/or real-time data feeds
- EE. No reliance solely on in-system reporting tools
- FF. Implementation Transparency
- GG. Clear implementation timeline with phases
- HH. Clear delineation of vendor vs. GHS responsibilities
- II. Identification of key dependencies (e.g., payroll cycles, cutover timing)

## 2.13. PRICING MODEL & STRUCTURE (informational only)

GHS is not requesting detailed pricing at this stage; however, vendors must provide a clear description of their pricing model and cost structure, including all components that may impact total cost of ownership. Vendors must clearly identify any components of their pricing model that are commonly excluded from initial proposals but may materially impact total cost.

Organization Profile (for Pricing Context Only):

1. Approximate employee count: 685
  2. Number of payroll entities: 1
  3. Number of locations: 10
  4. Pay frequency: biweekly
  5. Union/non-union (if relevant): Approximately 220 are non-union the rest are union.
  6. Fiscal Year budget for HCM solution \$200,000 to \$350,000
- A. Pricing Model Overview, describe the overall pricing approach (e.g., per employee per month (PEPM), tiered pricing, module-based, usage-based, etc.) and identify what drives cost (e.g., employee count, modules, transactions, payroll runs)
  - B. Cost Components, implementation costs (high-level ranges or cost drivers), subscription or licensing structure, optional modules or add-ons, integration costs (if applicable) and data migration costs (if applicable)
  - C. Pricing Dependencies, key factors that influence pricing (e.g., number of employees, complexity, number of integrations) and any minimums or thresholds
  - D. Ongoing Costs, support and maintenance structure, upgrade costs (if any), cost for additional environments (test/sandbox)
  - E. Additional Consideration, pricing for future scalability and any hidden or variable costs clients should anticipate



## 2.14. GENERAL REQUIREMENTS AND STANDARDS

- A. The selected Offeror shall comply with all privacy and security standards as stipulated by the Health Insurance Portability and Accountability Act (HIPAA) of 1996.
- B. The selected Offeror to provide these services will be in compliance with all applicable Federal and Michigan Laws, regulations and the Michigan Administrative Code, the Michigan Mental Health Code, 42 CFR and the Michigan Department of Health and Human Services (MDHHS) Contractual obligations.
- C. The Board reserves the right to accept or reject any/all submissions received pursuant to this SOQ, in whole or in part; and/or to waive any/all irregularities therein; and/or to delete/reduce the units of service; and/or to negotiate proposal terms in any way whatsoever to obtain a proposal as deemed in its best interest. The Board reserves the right to re-solicit/re-advertise as deemed necessary.
- D. If the services include the creation, receipt, maintenance, or transmission of protected health information (“PHI”), the selected proposer will be required to enter into the Agency’s standard Business Associate Agreement (“BAA”) prior to any PHI being disclosed or accessed. The proposer must comply with applicable HIPAA and HITECH requirements, and any subcontractor with access to PHI must be bound by written obligations that are consistent with those requirements. Failure to execute the Agency's BAA, or to provide materially equivalent protections acceptable to the Agency in its sole discretion, may result in disqualification from award or termination of any resulting contract.

## 2.15. TERM

The desired term of the agreement is three (3) years, with an optional 3-year renewal. The awarded contract will be funded by public funds. Termination due to lack of funding if/or when the funds are not appropriated or if the funding is discontinued, GHS may terminated the contract by written notice.

# 3. SOLICITATION REQUIREMENTS

## 3.1. DATE AND TIME REQUIREMENTS

The Board will make every effort to adhere to the schedule below. However, the Board reserves the right, at its sole discretion, to adjust the SOQ Schedule of Events as it deems necessary. All time is local to Flint, Michigan:

<b>EVENT</b>	<b>TIME and DATES</b>
Issue SOQ	Thursday, June 18, 2026
Questions accepted until (in offering at <a href="https://www.bidnetdirect.com/mitn">https://www.bidnetdirect.com/mitn</a> )	Monday, July 6, 2026 11:00 am
Response to written questions posted on:	Friday, July 10, 2026
Deadline for Final Submission of Submissions DUE DATE:	Tuesday, July 21, 2026 11:00 am
Evaluation Period	July 22 – July 31, 2026
Demonstrations by shortlist proposers	August 3 – August 16, 2026
PoC Phase	August 17 – August 30, 2026

Award (tentatively)	Thursday, September 24, 2026 GHS Board meeting
Service Date:	October 1, 2026, or other date agreed to by both parties

### 3.2. GENERAL FORMAT

#### A. Preparation and Formatting Requirements [Non-Scored]

The Offeror shall be responsible for preparing and submitting an effective, clear, and concise submission. Submissions must contain the following information:

- (a) Shall be written in the English language
- (b) Offeror will prepare a comprehensive document incorporating responses to each Section; said responses shall be presented as follows: Font Style "Arial or Calibri" with a minimum Font Size of 11
- (c) Offeror should prepare a Table of Contents with page numbers. Submission pages must be numbered.
- (d) All areas of the submission must be addressed in the same sequence cited in the SOQ Submission Requirements in order that proper consideration is given to the submission. Submissions without information or incomplete content will result in the submission being removed from consideration.
- (e) Offeror shall respond regarding how they will meet the requirements of each Section, cite the section number for each response with each section corresponding to the Table of Contents.
- (f) The Offeror must complete **Submittal Form A - Offeror Information, Form B – Solution Features, Form C - REFERENCES** and include with the submission.
- (g) The only accepted document formats for email submission are .pdf or Microsoft Word .doc, .docx
- (h) Form A is a mandatory submission and must be signed by the official authorized to bind the submitter to its provisions.

### 3.3. SUBMISSION REQUIREMENTS

- A. It is the responsibility of the Offeror to understand all details of the SOQ. The Offeror, by submitting a response indicates a full understanding of all details and specifications of the SOQ. Offerors are expected to present narrative statements/summaries in a clear, concise, and organized manner for review.
- B. **The Offeror is solely responsible for delivery of One (1) original submitted at bidnet direct by SOVRA <https://www.bidnetdirect.com/mitn>.** GHS has partnered with SOVRA as part of the Michigan Inter-governmental Trade Network (MITN) to post bid opportunities at the site and receive submissions. Submissions will be accepted until **Tuesday, July 21, 2026 11:00 am**. Submissions must be received by this date and time in order for the submission to be considered. All time is local to Flint, Michigan.

### 3.4. SUBMITTAL FORM TEMPLATES

- A. The offeror must ensure that their response meets all form and content requirements detailed within this SOQ. Enter your complete submission at SOVRA in addition to Submittal Forms, which must be used by the Offerors to provide requested information in a standard format. These forms must be included with your submission in SOVRA along with the requested narratives.

<b>Submittal Form</b>
FORM A - OFFEROR INFORMATION
FORM B – SOLUTION FEATURES
FORM C – REFERENCES

### 3.5. QUALIFICATIONS FORMAT AND SUBMISSION

1. **Executive Summary and Agency Qualifications:** Include a narrative response providing an overview of the agency's qualifications, experience, and understanding of the scope of work. Offeror shall describe any qualifications and/or experience and/or demonstrated competency to complete the defined services.
  - a. As part of the submission, include a list of any known potential subcontractors, including the portion of work being contracted out to other licensed contractors. All interested firms shall submit a capabilities package that explicitly demonstrates company capabilities-indicating examples of commercial sales and product specifications related to this effort. Also indicate if you are the manufacturer or provide the name and size of the manufacturer of the product(s) you will be supplying.
2. **Technical Capability and Solution Approach**  
 Narrative response describing how you will meet the technical validation and integration requirements. Include the following information in your response:
  - a. Integration architecture diagram
  - b. Sample API documentation and data schema
  - c. Example test plan
  - d. Sample implementation timeline
  - e. References with similar integrations
  - f. A realistic description of common implementation challenges
3. **Pricing Model & Structure:** vendors must provide a clear description of their pricing model and cost structure
4. **Offeror Information** (Submittal Form A) Completion and inclusion of this form with submission is a mandatory requirement. Any submission that does not include a signed Form A will not be considered.
  - b. Complete the information on Form A
  - c. Offeror must disclose any litigation involving the organization during the past five (5) years.
  - d. Respondents are further requested to indicate their status as a Foreign-owned/foreign-controlled firm and any contemplated foreign national employees on this effort.
  - e. Offeror shall submit documentation and proof of entity (e.g. IRS 501c3 determination); copy of Articles of Incorporation or document under which the organization is constituted/organized from its inception.
5. **Solution Features** (Submittal Form B) Vendors must respond to each requirement using one of the following values: Yes, No, or Other. The last page of the form allows for additional information, add more pages as needed. Vendors must provide a detailed

explanation, including any dependencies, required effort, timeline, and associated costs for features noted as 'Other'.

#### **6. References** (Submittal Form C)

## **4. EVALUATION PROCEDURES**

### **4.1. EVALUATION CRITERIA**

Submissions will be examined by a GHS evaluation team and scored. The intent of the evaluation process is to determine, through application of uniform criteria, how effectively the proposed service satisfies GHS requirements. The evaluation team will assign quality point scores to each submission using the criteria listed below.

#### **A. Functional Capability & Solution Approach (45 Points)**

Will review how well the solution meets the functional requirements and its alignment with GHS service delivery requirements. Assessment will focus on the comprehensiveness of the submission.

#### **B. SERVICE DELIVERY AND TECHNICAL SUPPORT MODEL (20 Points)**

Offeror's proposed service delivery framework including initial implementation approach, ongoing support structure, and capabilities.

#### **C. COMPLIANCE, SECURITY and RISK MANAGEMENT (15 Points)**

Regulatory compliance, security controls and data governance will be considered.

#### **D. REPORTING and ANALYTICS CAPABILITIES (10 Points)**

How well the solution handles Ad hoc reporting, real-time data access and integrations with data ecosystem will be evaluated.

#### **E. Technical Architecture & Integration (10 Points)**

### **4.2. EVALUATION PROCESS**

The evaluation committee will establish a shortlist of not less than three (3) firms deemed to be the most qualified. At the discretion of the committee, they may request oral presentations, solution demonstration, proof of concept, or additional information for clarification from the offeror. The additional information received will be evaluated with the same criteria. During the aforementioned procedures, neither the names of any of the offeror nor the contents of any submission will be disclosed until the completion of the recommended award after phase two of this process.

The evaluators will review and score the software demo presented by the shortlisted firms.

The evaluators in this phase will be GHS subject matter experts reviewing how cumbersome or not a designated task will be; whether or how a third party is engaged, or any customization.

The contract resulting from this SOQ and phase two, if any, will be awarded to the responsive and responsible Offeror offering the greatest benefit to GHS, as determined by GHS, when considering technical suitability for intended GHS purpose, supplier performance potential, and total cost.

## 5. ADMINISTRATIVE REQUIREMENTS

### 5.1. QUESTIONS, INQUIRES, CLARIFICATIONS, REQUESTS FOR INFORMATION

- A. All communications, any modifications, clarifications, amendments, questions, responses, or any other matters relating to this SOLICITATION must be submitted online in writing in the posted SOLICITATION at <https://www.bidnetdirect.com/mitn>. Questions will be responded to in writing and made available to all interested parties via posting at <https://www.bidnetdirect.com/mitn> in the posted SOLICITATION and available to all interested parties via posting on the Board's web page [www.genhs.org](http://www.genhs.org) under the <https://genhs.org/solicitation-grant-opportunities/> link.
- B. Offeror's are permitted to use Artificial Intelligence (AI) tools to assist in reviewing the SOQ documents; however, all clarification requests or questions submitted to GHS must be the result of offeror human review and must reflect the human's understanding of the solicitation.
- C. GHS will not respond to questions that appear to be generated solely by AI tools without context, relevance, or proper review by the offeror. Such submissions may be considered non-responsive. Offerors are responsible for the accuracy, clarity, and appropriateness of any questions submitted. Misuse of AI tools resulting in irrelevant, excessive, or incoherent clarification requests may be grounds for disqualification or rejection of the bid.

### 5.2. PURCHASING CONTACT

- A. The purchasing contact on this project is Cindy Stahmer, Purchasing Manager contact via email at [cstahmer@genhs.org](mailto:cstahmer@genhs.org) for matters not addressed in previous paragraph. No contact regarding this solicitation made with other GHS employees is permitted. Any violation of this condition may result in immediate rejection of the application.

### 5.3. ADDENDA

- A. All Applicants shall be responsible for routinely checking the GHS website at <https://genhs.org/solicitation-grant-opportunities/> and/or the posted SOLICITATION at <https://www.bidnetdirect.com/mitn> for issued addenda and other relevant information. GHS shall not be responsible for failure of an Applicant to obtain addenda and other relevant information issued at any time related to this SOLICITATION.

## 6. SUBMISSION FORMS

Following Pages

**SUBMITTAL FORM A – OFFEROR INFORMATION** submission of this form is a mandatory requirement  
SOQ Number: **26-021**

SOQ Name: **Human Capital Management (HCM) solution**

**Offeror Information**

Name of Organization:

Address:

Person to Contact, identify an individual that can be contacted for clarification on the submission:

*Name:*

*Title:*

*E-Mail Address:*

*Telephone Number:*

**STATEMENT OF CERTIFICATIONS AND ASSURANCES**

1) The Offeror has thoroughly reviewed this SOQ, contract documents, and all pertinent appendices, exhibits, and attachments included as part thereof, and that we fully understand all elements required for the full completion of the project as defined therein. 2) The Offeror further certifies that, if selected as the successful firm, we will enter into a contract agreement. 3) The prices in this Submission have been arrived at independently without collusion, consultation, communication, or agreement for the purpose of restricting competition as to any matter relating to such prices with any other firms or with any other competitor. 4) By signature below the signatory certifies legal authority to bind the responding entity to the provisions of this SOQ and any contract awarded pursuant to it. The Board may, at its sole discretion and at any time, require evidence documenting the signatory's authority to be personally bound or to legally bind the responding entity.

Authorized Representative Signature

Date

Printed Name & Title

Include the following as attachments with submittal Form A:

- ☐ Offeror must disclose any litigation involving the organization during the past five (5) years.
- ☐ Offeror confirms no Conflict of Interest exists as defined in section 7.5, if not, attach a statement explaining the conditions.
- ☐ Provided status as a Foreign-owned/foreign-controlled firm and any contemplated foreign national employees on this effort
- ☐ Offeror shall submit documentation and proof of entity (e.g. IRS 501(c)3 determination); copy of Articles of Incorporation or document under which the organization is constituted/organized from its inception;

## SUBMITTAL FORM B: SOLUTION FEATURES

Vendors must respond to each requirement using one of the following values: Yes, No, or Other, as defined below, indicate with an “X” in the appropriate response:

**Yes** – The proposed solution fully meets the requirement out-of-the-box, as part of the standard product offering, without requiring custom development, additional modules, third-party tools, or significant configuration beyond standard implementation practices. A “Yes” response indicates the functionality is natively available and production-ready within the current generally available release of the product. Responses that require clarification, dependencies, or additional effort must not be marked as “Yes.”

**No** – The proposed solution does not currently meet the requirement.

**Other** – The requirement can be met only with customization, configuration outside standard implementation, additional cost, third-party components, or future roadmap functionality. Vendors must provide a detailed explanation, including any dependencies, required effort, timeline, and associated costs.

	Yes	No	Other
<b>2.1. Applicant Tracking System (ATS)</b>			
A. Job posting and applicant management			
B. Electronic applications			
C. Interview scheduling and communication tracking			
D. Hiring analytics			
E. Configurable recruiting workflows and approval processes			
F. Automated notifications and candidate status updates			
G Integration with onboarding and Core HR modules			
<b>2.2 Onboarding</b>			
A. Collection and tracking of required pre-employment documentation :			
a Background checks			
b. Drug testing tracking			
c. Professional licenses and certifications			
d. College transcripts			
e. Reference checks			
B. Configurable onboarding workflows by employee group			
C Automated alerts, reminders, and task assignments for HR, managers, and new hires			
<b>2.3 Performance Management &amp; Development</b>			
A. Goal setting and performance tracking			
B. Performance evaluations and review cycles			
C. Employment development tracking including performance improvement plans, disciplinary actions.			
D. Learning and development management capabilities (if available)			
E. Configurable workflows and automated reminders for evaluations and approvals			

**SUBMITTAL FORM B: SOLUTION FEATURES page 2**

<b>2.4 Compensation &amp; Payroll Processing</b>	<b>Yes</b>	<b>No</b>	<b>Other</b>
A. Multiple compensation structures by position and employee group			
B. Merit increases and pay adjustments (including retroactive adjustments)			
C. Shift premiums			
D. Longevity pay with:			
a. Multiple eligibility rules			
b. Milestone based payouts			
E. Multiple pay codes (i.e. bereavement, PTO, holiday, FMLA, etc.)			
F. Voluntary and involuntary (garnishment) deductions			
G. Pretax vs. post tax deductions			
H. Ability to support 26 annual pay frequency (every 2 weeks) and ability for special pay runs (i.e. bonus)			
I. Automatically add Holiday Banked as well as other flexible holiday hours to employee banks based on their schedule (8, 10, 12 hours etc.)			
J. Easily add Supplemental Pay as needed – shift pick-ups, Doctor On Call, Retro pay, Bonuses, Severance Pay, and Payoff when employees terminate			
K. Special wage adjustments for individual employee types			
L. Ability to process PTO buyouts to various options, i.e. direct deposit, check, retirement accounts, etc.			
M. Allows for easy cost center changes on the timecard during daily work activities			
N. Easily process payroll corrections as needed			
O. Ability to handle complex PTO accruals based on seniority			
P. Allows for easy review and adjustment of PTO accruals as needed			
Q. Allows for an efficient method for deducting reimbursements from employee's gross pay			
R. Direct Deposit processing			
S. Tax administration			
T. W-2 processing			
U. Configurable payroll workflows and automated alerts			
V. Compliance with applicable public sector payroll regulations			
<b>2.5 Timekeeping &amp; Scheduling</b>			
A. Shift scheduling with customization by employee group			
B. Multiple clock in and clock out methods			
C. Automated lunch deductions			
D. Overtime tracking with configurable rules			
E. Compensatory time tracking and accrual rules			
F. Ad hoc and last minute schedule changes			
G. Tardiness tracking and rule enforcement			
H. Automated alerts and exception reporting			



**SUBMITTAL FORM B: SOLUTION FEATURES page 3**

<b>2.6 Reporting &amp; Analytics</b>	<b>Yes</b>	<b>No</b>	<b>Other</b>
A. Real time workforce, payroll, and timekeeping data			
B. Customizable dashboards for HR, leadership, and finance			
C. Standard and ad hoc reporting tools			
D. Automated alerts for exceptions, thresholds, and compliance risks			
E. Ability to create reports or have assistance with complex reports – reviewing payroll, management reports, payroll preview reports, etc.			
<b>2.7 Employee &amp; Manager Self Service Portal</b>			
A. View and update personal information			
B. Access pay statements, tax forms, and PTO balances			
C. View/Update tax withholdings, HSA, dependent care deductions, retirement deductions etc.			
D. View/Update payment options/bank account information(checking, savings)			
E. Benefits management including open enrollment and dependent request changes			
F. Mobile friendly and self-service access capabilities			
G. Submit and approve time, leave, and workflow requests			
H. Receive automated notifications and alerts			
<b>2.8 Core HR Management</b>			
A. Centralized employee records			
B. Employee directories			
C. Personal profile information including home address, emergency contacts			
D. PTO and leave tracking			
E. Key date tracking such as hire date, position date, seniority dates			
F. Role based security and audit trails			
<b>2.9 Accounting &amp; System Integrations</b>			
A. Integration with existing accounting and financial systems			
B. Secure data exchange between HR, payroll, timekeeping, and finance			
C. Vendor supported integrations or standard APIs			
<b>2.10 Expense Management</b>			
A. Electronic submission and approvals			
B. Reimbursement tracking			
C. Receipt management and efficiencies			
D. Policy verification at time of entry (meals, mileage rules, etc)			
E. Easy reporting and summarization by cost center and by employee.			
<b>2.11 Benefit Management</b>			
A. New hire enrollment			
B. Open enrollment			
C. Carrier integration			
D. ACA compliance			
F. Configurable workflows and approval chains			

**SUBMITTAL FORM B: SOLUTION FEATURES page 4**

<b>2.12 Technical Validation and Integration Requirements</b>	<b>Yes</b>	<b>No</b>	<b>Other</b>
<b>A. Integration Architecture (Required):</b>			
a Vendors must provide a detailed integration architecture diagram (not marketing material)			
b. Clearly define supported methods (APIs, file-based, webhooks)			
Identify real-time vs. batch capabilities and data formats			
c. Identify real-time vs. batch capabilities and data formats			
d. Outline any middleware dependencies			
<b>B. Data Ownership &amp; Access</b>			
a. GHS retains full ownership of all data			
b. Ability to export data on demand in standard formats			
c. Access to audit logs and raw data (no proprietary lock-in)			
<b>C. Versioning &amp; Change Management</b>			
a. Document API versioning strategy			
b Define advance notice for changes (e.g., 90–180 days)			
c. Provide sandbox/testing access prior to production updates			
<b>D. Testing &amp; Implementation</b>			
a. Provide a formal test plan approach (integration testing, UAT, etc.)			
b. Define vendor vs. client responsibilities			
c. Include sample test scripts/templates			
d. Provide a dedicated test environment			
e. Outline data migration validation process			
<b>E Security &amp; Compliance</b>			
a. HIPAA-aligned controls and willingness to sign a BAA			
b. Encryption at rest and in transit			
c. MFA, role-based access controls, and audit logging			
d. Security certifications (e.g., SOC 2)			
<b>F. Identity Integration</b>			
a. Support for SSO (SAML/OIDC) and integration with Microsoft Entra ID			
b. Automated user provisioning/deprovisioning (SCIM preferred)			
<b>G. Reporting &amp; Data Integration</b>			
a. Ability to integrate with our reporting/data environment			
b. Support for scheduled and/or real-time data feeds			
c. No reliance solely on in-system reporting tools			
<b>H. Implementation Transparency</b>			
a. Clear implementation timeline with phases			
b Clear delineation of vendor vs. GHS responsibilities			
c. Identification of key dependencies (e.g., payroll cycles, cutover timing)			

**SUBMITTAL FORM B: SOLUTION FEATURES page 4**

Provide a detailed explanation, including any dependencies, required effort, timeline, and associated costs to the cited feature marked as 'Other'.

Add explanation here, please reference section number and item.

**SUBMITTAL FORM C – REFERENCES** provide References with similar integrations

<b>Reference 1</b>	
Client's Name:	
Business Address:	
Contact Name and Title:	
Phone and Email:	
Complexity of operation	
Outcomes achieved	
<b>Reference 2</b>	
Client's Name:	
Business Address:	
Contact Name and Title:	
Phone and Email:	
Complexity of operation	
Outcomes achieved	
<b>Reference 3</b>	
Client's Name:	
Business Address:	
Contact Name and Title:	
Phone and Email:	
Complexity of operation	
Outcomes achieved	

## 7. STANDARD TERMS & CONDITIONS

### 7.1. COST LIABILITY

- A. The Board assumes no responsibility or liability for costs by the Offeror, or any Offeror prior to the execution of a contract between the organization and the Board. The Offeror agrees that its submission will be considered an offer to do business with the Board in accordance with its submission, and that its submission will be irrevocable and binding for a period of 180 calendar days from date of submission.

### 7.2. OTHER MATERIALS

- A. Offerors may attach other materials believed to be relevant to illustrating the Offeror's ability to successfully provide these services. Only material which includes a clearly stated value to GHS will be considered. The offeror must state the relevance and reason for including additional information.

### 7.3. AWARD OF CONTRACT

- A. It is the intent of the Board to enter into a contract with provider(s) that will emphasize administrative efficiencies, and possess the capacity, infrastructure and organizational competence to provide the requirements under this submission.
- B. Award recommendations are contingent upon an initial evaluation of the Offeror's qualifications to determine if the Offeror is a quality provider.
- C. Offerors who are awarded contracts shall not assign or delegate any of their duties or obligations under the contract to any other party without written permission of the Board.

### 7.4. DISCLOSURE

- A. All information in an Offeror's submission is subject under the provisions of Public Act No. 442 of 1976 known as the Freedom of Information Act.

### 7.5. CONFLICT OF INTEREST

- A. Offerors awarded a contract will affirm that no principal, representative, agent, or other acting on behalf of or legally capable of acting on the behalf of the Offeror, is currently an employee of the Board; nor will any such person connected to the Offeror currently be using or privy to any information regarding the Board which may constitute a conflict of interest.
- B. At the time of the submission, all Offerors shall disclose any known direct or indirect financial interests (including but not limited to ownership, investment interests, or any other form of remuneration) that may be present between the Offeror or its potential subcontractors, and Board personnel. This disclosure shall be made to the Boards' Director of Operations who will forward the information to the CEO.

### 7.6. RELATIONSHIP OF THE PARTIES (INDEPENDENT CONTRACTOR)

- A. The relationship between the Board and any Offerors successful in obtaining a contract is that of client and independent contractor. No agent, employee, or servant of the contractor shall be deemed to be an employee, agent, or servant of the Board for any reason. The independent contractor will be solely and entirely responsible for its acts and the acts of its agents, employees, and servants during the performance of a contract resulting from the SOQ.

#### 7.7. NO WAIVER OF DEFAULT

- A. The failure of the Board to insist upon strict adherence to any term of a contract resulting from this SOQ shall not be considered a waiver or deprive the Board of the right thereafter to insist upon strict adherence to that term, or any other term, of the contract.

#### 7.8. DISCLAIMER

- A. All the information contained within this SOQ reflects the best and most accurate information available to the Board at the time of the SOQ preparation. No inaccuracies in such information shall constitute a basis for legal recovery of damages, either real or punitive. If it becomes necessary to revise any part of this SOQ, a supplement will be issued to all potential Offerors who obtained the original SOQ.

#### 7.9. ASSIGNMENT AND SUBCONTRACTING

- A. This listing of potential subcontractors shall be limited to the name of the company, name of the company's owner(s), and business address. If any other subcontractor is selected after a contract is awarded, the successful Offeror shall provide the Board with the name of the company, its owner(s), and address. This requirement is not intended to apply to minimal relationships such as the purchase of a small dollar amount of supplies to complete a project. The offeror shall not enter into subcontracts to the final agreement with additional parties without obtaining prior written approval of the Board. A condition of granting such approval is that such subcontractors shall be subject to all conditions and provisions of the contract. The offeror shall be responsible for the performance of all subcontractors.
- B. The parties agree not to assign this Contract without the prior written consent of the other party. Agency retains the right to review, approve and monitor any subcontracts or any subcontractor's compliance with this Agreement and all applicable laws and regulations. Any subcontracting approved by Agency shall not terminate the Contractor's legal responsibilities under this Agreement.