

RFP NO. 20-R075104BB  
TIME & ATTENDANCE AND  
LEAVE MANAGEMENT  
SYSTEM  
(NIGP # 918-71)  
SEPTEMBER 1, 2020

Manatee County BCC  
Procurement Division  
1112 Manatee Avenue West  
Suite 803  
Bradenton, FL 34205  
[purchasing@mymanatee.org](mailto:purchasing@mymanatee.org)



**ADVERTISEMENT  
REQUEST FOR PROPOSALS NO. 20-R075104BB  
TIME & ATTENDANCE AND LEAVE MANAGEMENT SYSTEM**

Manatee County, a political subdivision of the State of Florida (County), will receive Proposals from individuals, corporations, partnerships, and other legal entities authorized to do business in the State of Florida (Proposers) to provide a Time & Attendance and Leave Management System, as specified in this Request for Proposals (RFP).

**DATE, TIME AND PLACE DUE**

The Due Date and Time for submission of Proposals in response to this RFP is **September 30, 2020 at 3:00 P.M. ET**. Proposals must be delivered to the following location: Manatee County Administration Building, Procurement Division, 1112 Manatee Avenue West, Suite 803, Bradenton, FL 34205 prior to the Due Date and Time.

**DEADLINE FOR QUESTIONS AND CLARIFICATION REQUESTS**

The deadline to submit all questions, inquiries, and requests concerning interpretation, clarification, or additional information pertaining to this RFP to the Manatee County Procurement Division is September 16, 2020. Questions and inquiries should be submitted via email to the Designated Procurement Contact shown below.

**Important: A prohibition of lobbying is in place. Review Section A.12 carefully to avoid violation and possible sanctions.**

**DESIGNATED PROCUREMENT CONTACT**

Brooke Baker, Procurement Team Leader  
Phone: (941)748-4501, Ext. 3039  
Email: [brooke.baker@mymanatee.org](mailto:brooke.baker@mymanatee.org)  
Manatee County Financial Management Department  
Procurement Division

AUTHORIZED FOR RELEASE:

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## **SECTION A, INSTRUCTIONS TO PROPOSERS**

In order to receive consideration, Proposers must meet the minimum qualification requirements and comply with the following instructions. Proposals will be accepted from a single business entity, joint venture, partnership or corporation.

### **A.01 PROPOSAL DUE DATE**

The Due Date and Time for submission of Proposals in response to this RFP is **September 30, 2020 at 3:00 P.M. ET**. Proposals must be delivered to the following location: Manatee County Administration Building, Procurement Division, 1112 Manatee Avenue West, Suite 803, Bradenton, FL 34205 and be time stamped by a Procurement representative prior to the Due Date and Time. Proposals will be opened immediately following the Due Date and Time at the Manatee County Administration Building, Procurement Division, Suite 803.

Proposals received after the Due Date and Time will not be considered. It will be the sole responsibility of the Proposer to deliver its Proposal to the Manatee County Procurement Division for receipt on or before the Due Date and Time. If a Proposal is sent by U.S. Mail, courier, or other delivery services, the Proposer will be responsible for its timely delivery to the Procurement Division. Proposals delayed in delivery will not be considered, will not be opened at the public opening, and arrangements will be made for their return at the Proposer's request and expense.

### **A.02 PUBLIC OPENING OF PROPOSALS**

Sealed Proposals will be publicly opened at the Manatee County Administration Building, Procurement Division, 1112 Manatee Avenue West, Suite 803, Bradenton, FL 34205, in the presence of County officials immediately upon expiration of the Due Date and Time. Proposers and/or their representatives may attend the Proposal Opening virtually by accessing the link below:

Zoom® Webinar Link: <https://manateecounty.zoom.us/j/85107483384>

Manatee County will make public the names of the business entities which submitted a Proposal and the city and state in which they reside at the opening. No review or analysis of the Proposals will be conducted at the Virtual Proposal Opening.

### **A.03 SUBMISSION OF PROPOSALS**

The contents of the sealed Proposal package must include:

- a. One (1) bound original clearly identifying the Proposer and marked "ORIGINAL".
- b. Four (4) bound copies clearly identifying the Proposer and marked "COPY" with all required information and identical to the original.
- c. One (1) electronic copy clearly identifying the Proposer with all required information and identical to the original.

The electronic copy must be submitted on a Universal Serial Bus (USB) portable flash memory drive in Microsoft Word format in one (1) file that includes all required tab

sections shown in Exhibit 2 in a continuous file. The electronic copy of Attachment J, Fee Forms must be submitted on the same USB in Microsoft Excel format. Do not submit the electronic format Proposal with separate files for each tab section. Do not password protect or otherwise encrypt the electronic Proposal copy. The electronic copy must contain an identical Proposal to the ORIGINAL.

Submit the Proposal package in a sealed container with the following information clearly marked on the outside of the package: RFP No. 20-R075104BB, Time & Attendance and Leave Management System, Proposer's name, and Proposer's address. Proposals must be received by the Manatee County Procurement Division prior to the Due Date and Time at the following address:

Manatee County  
Procurement Division  
1112 Manatee Avenue West, Suite 803  
Bradenton, FL 34205

#### **A.04 ORGANIZATION OF PROPOSALS**

Proposals must be organized and arranged with tabs in the same order as listed in the subsections within Exhibit 2 identifying the response to each specific item. Proposals must clearly indicate the legal name, address, and telephone number of the Proposer. Proposals must be signed by an individual authorized to make representations for the Proposer.

#### **A.05 DISTRIBUTION OF SOLICITATION DOCUMENTS**

All documents issued pursuant to this RFP are distributed electronically and available for download at no charge at [www.mymanatee.org](http://www.mymanatee.org) > *Bids and Proposals*. This link is located on the left side of the County website home page. Documents may be viewed and downloaded for printing using Adobe Reader® software.

At its sole discretion, the County may utilize a third-party provider, to distribute proposals. Visit the third-party's website for more information regarding this service. Participation in the third-party system is not a requirement for doing business with Manatee County.

Additionally, the RFP and all related documents are available for public inspection at the Manatee County Procurement Division, 1112 Manatee Avenue West, Suite 803, Bradenton, FL 34205. Call (941) 749-3014 to schedule an appointment. Documents are available between the hours of 8:00 A.M. and 5:00 P.M., Monday through Friday, with the exception of County holidays.

As a courtesy, Manatee County notifies the Manatee County Chamber of Commerce and the Manasota Black Chamber of Commerce of all active solicitations, who then distributes the information to its members.

#### **A.06 ADDENDA**

Any interpretations, corrections or changes to this RFP will be made by addenda. Addenda will be posted on the Procurement Division's web page of the County website at

<http://www.mymanatee.org/purchasing> > *Bids and Proposals*. For those solicitations that are advertised on a third-party distribution system, addenda will also be posted on the third-party distribution system on the 'Planholders' link.

All addenda are a part of the RFP and each Proposer will be bound by such addenda. It is the responsibility of each Proposer to read and comprehend all addenda issued. Failure of any Proposer to acknowledge an issued addendum in its Proposal will not relieve the Proposer from any obligation contained therein.

**A.07 PROPOSAL EXPENSES**

All costs incurred by Proposer in responding to this RFP and to participate in any interviews/presentations/demonstrations, including travel, will be the sole responsibility of the Proposer.

**A.08 QUESTION AND CLARIFICATION PERIOD**

Each Proposer shall examine all RFP documents and will judge all matters relating to the adequacy and accuracy of such documents. Any questions or requests concerning interpretation, modification, clarification or additional information pertaining to this RFP shall be made in writing via email to the Manatee County Procurement Division to the Designated Procurement Contact or to [purchasing@mymanatee.org](mailto:purchasing@mymanatee.org). All questions received and responses given will be provided to potential Proposers via an addendum to this RFP.

If the Proposer requests modifications to the RFP documents, the Proposer must provide detailed justification for each modification requested. The County will determine what changes will be acceptable to the County and changes approved by the County will be issued in a written addendum

Manatee County will not be responsible for oral interpretations given by other sources including County staff, representative, or others. The issuance of a written addendum by the Procurement Division is the only official method whereby interpretation, clarification or additional information will be given.

**A.09 FALSE OR MISLEADING STATEMENTS**

Proposals which contain false or misleading statements, or which provide references which do not support an attribute or condition claimed by the Proposer, may be rejected. If, in the opinion of the County, such information was intended to mislead the County in its evaluation of the Proposal, and the attribute, condition or capability is a requirement of this RFP such Proposer will be disqualified from consideration for this RFP and may be disqualified from submitting a response on future solicitation opportunities with the County.

**A.10 WITHDRAWAL OR REVISION OF PROPOSALS**

Proposers may withdraw Proposals under the following circumstances:

- a. If Proposer discovers a mistake(s) prior to the Due Date and Time. Proposer may

withdraw its Proposal by submitting a written notice to the Procurement Division. The notice must be received in the Procurement Division prior to the Due Date and Time for receiving Proposals. A copy of the request shall be retained, and the unopened Proposal returned to the Proposer; or

- b. After the Proposals are opened but before a contract is signed, Proposer alleges a material mistake of fact if:
  1. The mistake is clearly evident in the solicitation document; or
  2. Proposer submits evidence which clearly and convincingly demonstrates that a mistake was made in the Proposal. Request to withdraw a Proposal must be in writing and approved by the Procurement Official.

#### **A.11 JOINT VENTURES**

Proposers intending to submit a Proposal as a joint venture with another entity are required to have filed proper documents with the Florida Department of Business and Professional Regulation and all other State or local licensing agencies as required by Florida Statute Section 489.119, prior to the Due Date and Time.

#### **A.12 LOBBYING**

After the issuance of any solicitation, no prospective Proposers, or their agents, representatives or persons acting at the request of such Proposers, shall contact, communicate with or discuss any matter relating in any way to the solicitation with any County officers, agents or employees, other than the Procurement Official or designee, unless otherwise directed by the Procurement Official or designee. This prohibition includes copying such persons on written communications (including email correspondence) but does not apply to presentations made to evaluation committees or at a County Commission meeting where the Commission is considering approval of a proposed contract/purchase order. This requirement ends upon final execution of the contract/purchase order or at the time the solicitation is cancelled. Violators of this prohibition will be subject to sanctions as provided in the Manatee County Code of Ordinances Section 2-26-31 and 2-26-32. Sanctions may include (a) written warning; (b) termination of contracts; and (c) debarment or suspension.

#### **A.13 EXAMINATION OF PROPOSALS**

The examination and evaluation of the Proposals submitted in response to this solicitation generally requires a period of not less than ninety (90) calendar days from the Due Date and Time.

#### **A.14 ERRORS OR OMISSIONS**

Once a Proposal is opened, the County will not accept any request by Proposer to correct errors or omissions in the Proposal other than as identified in paragraph A.10.

#### **A.15 DETERMINATION OF RESPONSIBLENESS AND RESPONSIVENESS**

The County will conduct a due diligence review of all Proposals received to determine if the Proposer is responsible and responsive.

To be responsive a Proposer must submit a Proposal that conforms in all material respects to the requirements of this RFP and contains all the information, fully completed attachments and forms, and other documentation required. Proposals that are deemed non-responsive will not be considered or evaluated.

To be responsible, a Proposer must meet the minimum qualification requirements and have the capability to perform the Scope of Services contained in this RFP. Proposals submitted by Proposers that are deemed non-responsible will not be considered or evaluated.

**A.16 RESERVED RIGHTS**

The County reserves the right to accept or reject any and all Proposals, to waive irregularities and technicalities, to request additional information and documentation, and to cancel this solicitation at any time prior to execution of the contract. In the event only one Proposal is received, the County reserves the right to negotiate with the Proposer. The County reserves the right to award the contract to a responsive and responsible Proposer which in its sole determination is the best value and in the best interests of the County.

The County reserves the right to conduct an investigation as it deems necessary to determine the ability of any Proposer to perform the work or service requested. Upon request by the County, Proposer shall provide all such information to the County. Additional information may include, but will not be limited to, current financial statements prepared in accordance with generally accepted accounting practices and certified by an independent CPA or official of Proposer; verification of availability of equipment and personnel; and past performance records.

**A.17 APPLICABLE LAWS**

Proposer must be authorized to transact business in the State of Florida. All applicable laws and regulations of the State of Florida and ordinances and regulations of Manatee County will apply to any resulting contract. This solicitation process will be conducted in accordance with Manatee County Code of Ordinances, Chapter 2-26.

**A.18 TAXES**

Manatee County is exempt from Federal Excise and State Sales Taxes. (F.E.T. Cert. No. 59-78-0089K; Florida Sales Tax Exempt Cert. No. 85-8012622206C-6). Therefore, the Proposer is prohibited from delineating a separate line item in its Proposal for any sales or service taxes.

The successful Proposer will be responsible for the payment of taxes of any kind, including but not limited to sales, consumer, use, and other similar taxes payable on account of the work performed and/or materials furnished under the award in accordance with all applicable laws and regulations.

**A.19 SCRUTINIZED COMPANIES**

Pursuant to Florida Statute Section 287.135, as of July 1, 2012, a company that, at the time of submitting a response for a new contract or renewal of an existing contract, is on the



Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to Florida Statute Section 215.473, is ineligible for, and may not submit a response for or enter into or renew a contract with an agency or local governmental entity for goods or services of \$1 million or more.

#### **A.20 COLLUSION**

Proposer certifies that its Proposal is made without prior understanding, agreement, or connection with any other corporation, firm or person submitting a Proposal for the same materials, services, supplies, or equipment and is in all respects fair and without collusion or fraud.

Any such violation may result in contract cancellation, return of materials or discontinuation of services and the possible removal of Proposer from participation in future County solicitations for a specified period.

The County reserves the right to disqualify a Proposer during any phase of the solicitation process and terminate for cause any resulting contract upon evidence of collusion with intent to defraud on the part of the Proposer.

#### **A.21 CODE OF ETHICS**

With respect to this proposal, if any Proposer violates, directly or indirectly, the ethics provisions of the Manatee County Procurement Code and/or Florida criminal or civil laws related to public procurement, including but not limited to Florida Statutes Chapter 112, Part II, Code of Ethics for Public Officers and Employees, such Proposer will be disqualified from eligibility to perform the work described in this RFP, and may also be disqualified from submitting any future bids or proposals to supply goods or services to Manatee County.

#### **A.22 PUBLIC ENTITY CRIMES**

In accordance with Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases or real property to a public entity, may not be awarded or perform work as a contractor, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for Category Two for a period of 36 months from the date of being placed on the convicted vendor list.

In addition, Manatee County Code of Laws Chapter 2-26 Article V prohibits the award of County contracts to any person or entity who/which has, within the past 5 years, been convicted of, or admitted to in court or sworn to under oath, a public entity crime or of any environmental law that, in the reasonable opinion of the Procurement Official, establishes reasonable grounds to believe the person or business entity will not conduct business in a reasonable manner.

To ensure compliance with the foregoing, Manatee County Code of Laws requires all persons or entities desiring to contract with Manatee County to execute and file with the Purchasing Official an affidavit, executed under the pain and penalties of perjury, confirming that person, entity, and any person(s) affiliated with the entity, does not have such a record and is therefore eligible to seek and be awarded business with Manatee County. Proposer is to complete Attachment C and submit with its Proposal.

**A.23 AMERICANS WITH DISABILITIES**

Manatee County does not discriminate upon the basis of any individual's disability status. This non-discrimination policy involves every aspect of County's functions including one's access to participation, employment, or treatment in its programs or activities. Anyone requiring reasonable accommodation for an information conference or proposal opening should contact the person named on the cover page of this document at least twenty-four (24) hours in advance of either activity.

**A.24 EQUAL EMPLOYMENT OPPORTUNITY**

In accordance with Title VI of the Civil Rights Act of 1964, Title 15, Part 8 of the Code of Federal Regulations and the Civil Rights Act of 1992, Manatee County hereby notifies all Proposers that it will affirmatively ensure minority business enterprises are afforded full opportunity to participate in response to this RFP and will not be discriminated against on the grounds of race, color, national origin, religion, sex, age, handicap, or marital status in consideration of award.

**A.25 MINORITY AND/OR DISADVANTAGED BUSINESS ENTERPRISE**

The State of Florida Office of Contractor Diversity provides the certification process and maintains the database of certified MBE/DBE firms. Additional information may be obtained at

[https://www.dms.myflorida.com/agency\\_administration/office\\_of\\_Contractor\\_diversity\\_osd/get\\_certified](https://www.dms.myflorida.com/agency_administration/office_of_Contractor_diversity_osd/get_certified).

**A.26 DISCLOSURE**

Upon receipt, all inquiries and responses to inquiries related to this RFP become "Public Records" and shall be subject to public disclosure consistent with Florida Statute, Chapter 119.

Proposals become subject to disclosure thirty (30) days after the opening or if a notice of intent to award decision is made earlier than this time as provided by Florida Statutes § 119.071(1)(b). No announcement or review of the proposals shall be conducted at the public opening.

If County rejects all proposals and concurrently notices its intent to reissue the solicitation, the rejected proposals are exempt from public disclosure until such time the County provides notice of an intended decision concerning the reissued solicitation or until County withdraws the reissued solicitation. A proposal is not exempt for longer than twelve (12) months after the initial notice of rejection of all proposals.

Pursuant to Florida Statute 119.0701, to the extent successful Proposer is performing services on behalf of County, successful Proposer must:

- a. Keep and maintain public records required by public agency to perform the service. That information and data it manages as part of the services may be public record in accordance with Chapter 119, Florida Statutes and Manatee County public record policies. Proposer agrees, prior to providing goods/services, it will implement policies and procedures, which are subject to approval by County, to maintain, produce, secure, and retain public records in accordance with applicable laws, regulations, and County policies including but not limited to Section 119.0701, Florida Statutes.
- b. Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Florida Statutes, Chapter 119, or as otherwise provided by law.
- c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the successful Proposer does not transfer the records to the public agency.
- d. Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of contractor or keep and maintain public records required by the public agency to perform the service. If the successful Proposer transfers all public records to County upon completion of the contract, the successful Proposer shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the successful Proposer keeps and maintains public records upon completion of the contract, the successful Proposer shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to County, upon request from County's custodian of public records, in a format that is compatible with the information technology systems of County.

**IF THE SUCCESSFUL PROPOSER HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ITS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO ANY RESULTING CONTRACT, CONTACT COUNTY'S CUSTODIAN OF PUBLIC RECORDS AT:**

**PHONE: (941) 742-5845**

**EMAIL: [DEBBIE.SCACCIAOCE@MYMANATEE.ORG](mailto:DEBBIE.SCACCIAOCE@MYMANATEE.ORG)**

**ATTN: RECORDS MANAGER**

**1112 MANATEE AVENUE WEST**

**BRADENTON, FL 34205**

#### **A.27 TRADE SECRETS**

Manatee County is subject to Chapter 119, Florida Statutes. Therefore, all documents, materials, and data submitted as part of a Proposal in response to a RFP are governed by the disclosure, exemption and confidentiality provisions relating to public records in Florida Statutes.

**Notwithstanding any other provision in this solicitation, designation of the entire Proposal as trade secret, proprietary, or confidential, is not permitted and may result in a determination that the Proposal is non-responsive and therefore the Proposal will not be evaluated or considered.**

Except for materials that are ‘trade secrets’ as defined by Chapter 812, Florida Statutes, ownership of all documents, materials and data submitted as part of a Proposal in response to the RFP shall belong exclusively to County.

To the extent that Proposer desires to maintain the confidentiality of materials that constitute trade secrets pursuant to Florida law, trade secret material submitted must be segregated from the portions of the Proposal that are not declared as trade secret. In addition, Proposer shall cite, for each trade secret claimed, the Florida Statute number which supports the designation. Further, Proposer shall offer a brief written explanation as to why the cited Statute is applicable to the information claimed as trade secret. Additionally, Proposer shall provide a hard copy of its Proposal that redacts all information designated as trade secret.

In conjunction with trade secret designation, Proposer acknowledges and agrees that:

- a. Trade secret requests made after the opening will not be considered. However, County reserves the right to clarify the Proposers request for trade secret at any time; and
- b. County and its officials, employees, agents, and representatives are hereby granted full rights to access, view, consider, and discuss the information designated as trade secret throughout the evaluation process and until final execution of any awarded purchase order or contract; and
- c. That after notice from County that a public records request has been made pursuant to Proposer’s Proposal, the Proposer at its sole expense, shall be responsible for defending its determination that submitted material is a trade secret and is not subject to disclosure. Action by Proposer in response to notice from the County shall be taken immediately, but no later than 10 calendar days from the date of notification or Proposer will be deemed to have waived the trade secret designation of the materials.

Offeror shall indemnify and hold County, and its officials, employees, agents and representatives harmless from any actions, damages (including attorney’s fees and costs), or claims arising from or related to the designation of trade secrets by the Proposer, including actions or claims arising from County’s non-disclosure of the trade secret materials.

#### **A.28 CONFIDENTIALITY OF SECURITY RELATED RECORDS**

- a. Pursuant to Florida Statutes § 119.071(3), the following records (hereinafter referred to collectively as “the Confidential Security Records”) are confidential and exempt from the disclosure requirements of Florida Statutes § 119.07(1):
  1. A Security System Plan or portion thereof for any property owned by or leased to County or any privately owned or leased property held by County.

2. Building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout and structural elements of a building, arena, stadium, water treatment facility, or other structure owned or operated by County.
  3. Building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout or structural elements of an attractions and recreation facility, entertainment or resort complex, industrial complex, retail and service development, office development, or hotel or motel development in the possession of, submitted to County.
- b. Successful Proposer agrees that, as provided by Florida Statute, it shall not, as a result of a public records request, or for other reason disclose the contents of, or release or provide copies of the Confidential Security Records to any other party absent the express written authorization of County's Property Management Director or to comply with a court order requiring such release or disclosure. To the extent successful Proposer receives a request for such records, it shall immediately contact the County's designated Contract administrator who shall coordinate County's response to the request.

#### **A.29 E-VERIFY**

Prior to the employment of any person under this contract, the successful Proposer shall utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of (a) all persons employed during the contract term by the successful Proposer to perform employment duties within Florida and (b) all persons, including subcontractors, assigned by the successful Proposer to perform work pursuant to the contract with Manatee County. For more information on this process, please refer to United States Citizenship and Immigration Service site at: <http://www.uscis.gov/>. Only those individuals determined eligible to work in the United States shall be employed under this contract.

By submission of a Proposal in response to this RFP, the successful Proposer commits that all employees and subcontractors will undergo e-verification before placement on this contract.

The successful Proposer shall maintain sole responsibility for the actions of its employees and subcontractors. For the life of the contract, all employees and new employees brought in after contract award shall be verified under the same requirement stated above.

#### **A.30 LICENSES AND PERMITS**

The successful Proposer shall be solely responsible for obtaining all necessary license and permit fees, including, but not limited to, all license fees, permit fees, impact fees, or inspection fees, and responsible for the costs of such fees. Successful Proposer is solely responsible for ensuring all work complies with all Federal, State, local, and Manatee County ordinances, orders, codes, laws, rules, regulations, directives, and guidelines.

**A.31 HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT (HIPAA)**

Any person or entity that performs or assists the County with a function or activity involving the use or disclosure of “individually identifiable health information (IIHI) and/or Protected Health Information (PHI) shall comply with the Health Insurance Portability and Accountability Act (HIPAA) of 1996. HIPAA mandates for privacy, security, and electronic transfer standards include, but are not limited to:

- a. Use of information only for performing services required by the contract or as required by law;
- b. Use of appropriate safeguards to prevent non-permitted disclosures;
- c. Reporting to the County any non-permitted use or disclosure;
- d. Assurances that any agents and subcontractors agree to the same restrictions and conditions that apply to the Proposer and reasonable assurances that IIHI/PHI will be held confidential;
- e. Making PHI available to the customer;
- f. Making PHI available to the customer for review and amendment, and incorporating any amendments requested by the customer; and
- g. Making PHI available to the County for an accounting of disclosures; and making internal practices, books, and records related to PHI available to the County for compliance audits.

PHI shall maintain its protected status regardless of the form and method of transmission (paper records and/or electronic transfer of data). The selected Proposer must give its customers written notice of its privacy information practices, including specifically, a description of the types of uses and disclosures that would be made with protected health information.

**A.32 BINDING OFFER**

Proposals will remain valid for a period of 120 days following the Due Date and Time and will be considered a binding offer to perform the required services and/or provide the required goods. The submission of a Proposal will be taken as prima facie evidence that the Proposer has familiarized itself with the contents of this Solicitation.

**A.33 PROTEST**

Any actual bidder, proposer, or contractor who is aggrieved in connection with the notice of intent to award of a contract with a value greater than \$250,000 where such grievance is asserted to be the result of a violation of the requirements of the Manatee County Procurement Code or any applicable provision of law by the officers, agents, or employees of the County, may file a protest to the Procurement Official.

Protest must be in writing and delivered via email at [purchasing@mymanatee.org](mailto:purchasing@mymanatee.org) or by hand delivery to the Procurement Division at 1112 Manatee Avenue West, Suite 803, Bradenton, FL 34205 by 5:00 p.m. on the fifth business day following the date of posting of the Notice of Intent to Award on the County website. There is no stay of the procurement process during a protest. The Procurement Official shall have the authority to settle and resolve a protest concerning the intended award of a contract.

For additional information regarding the County protest process, visit the Procurement Division webpage on the County website.

**A.34 ACCESSIBILITY**

The County is committed to making its documents and information technologies accessible to individuals with disabilities by meeting the requirements of Section 508 of the Rehabilitation Act and best practices (W3C WCAG 2). **For assistance with accessibility regarding this solicitation, contact the Manatee County Procurement Division via email at [purchasing@mymanatee.org](mailto:purchasing@mymanatee.org) or by phone at 941-748-4501, X3014.**

Successful Proposer shall ensure all its electronic information, documents, applications, reports, and deliverables required under the Agreement are in a format that meets the requirements of Section 508 of the Rehabilitation Act and best practices (W3C WCAG 2). Where not fully compliant with these requirements and best practices, Successful Proposer shall provide clear points of contact for each document and information technology to direct users in how to obtain alternate formats. Further, successful Proposer shall develop accommodation strategies for those non-compliant resources and implement strategies to resolve the discrepancies.

**A.35 PURCHASING COOPERATIVE**

It is the intent of this RFP to include requirements and to obtain proposals on behalf of Manatee County. Further it authorizes entities belonging to the Sarasota Bay Area Chapter of NIGP to obtain goods and services utilizing the terms, conditions and pricing of this RFP. This opportunity is also made available to all public agencies, pursuant to their own governing laws, and subject to the agreement of the supplier. Manatee County will not be financially responsible for the purchases of other public agencies utilizing this RFP and any resulting contract or purchase order.

**A.36 SOLICITATION SCHEDULE**

The following schedule has been established for this Solicitation process. Refer to the County’s website ([www.mymanatee.org](http://www.mymanatee.org) > Online Services > *Bids & Proposals*) for meeting locations and updated information pertaining to any revisions to this schedule.

Scheduled Item	Scheduled Date
Question and Clarification Deadline	September 16, 2020
Final Addendum Posted	September 23, 2020
Proposal Due Date and Time	September 30, 2020 by 3:00 P.M. ET
Technical Evaluation Meeting No. 1	TBA
Technical Evaluation Meeting No. 2	TBA
Interviews/Demonstrations/Presentations	TBA
Final Technical Evaluations	TBA
Projected Award	November of 2020

**END OF SECTION A**

## **SECTION B, EVALUATION OF PROPOSALS**

### **B.01 EVALUATION**

Evaluation of Proposals will be conducted by an evaluation committee. Each evaluation committee member will evaluate, score, and rank the Proposals for each of the evaluation criteria.

The committee may final rank Proposals without conducting interviews, presentations, and/or demonstrations with Proposers. Therefore, each Proposer must ensure that its Proposal contains all the information requested in this RFP and reflects Proposer's best offer.

The committee will consider all information submitted by each responsible and responsive Proposer, clarification information provided by Proposer, information obtained during the interview/presentation/demonstration, feedback received from Proposer's references, and any other relevant information received during any investigation of Proposer, to ascertain the ability of the Proposer to perform the scope of services as stated in this RFP.

### **B.02 EVALUATION CRITERIA**

The following evaluation criteria have been established for this RFP.

<b>Criteria</b>	<b>Maximum Weight</b>
Proposer & Team's Experience	20%
Capacity	25%
Approach	30%
Fee Proposal	10%
Interviews/Demonstrations	15%

### **B.03 CLARIFICATIONS/INTERVIEWS /PRESENTATIONS/ DEMONSTRATIONS**

As part of the evaluation process the evaluation committee may request additional information or clarification from Proposers for the purpose of further evaluation of (a) conformance to the solicitation requirements, (b) the abilities of the Proposer, and (c) understanding of the Proposal submitted. Additional information and/or clarification must be submitted by Proposer within the requested time-period.

Additionally, interviews, presentations, and/or demonstrations may be conducted with Proposers as part of the evaluation process. If conducted, the evaluation committee will make a determination of those Proposals that are deemed by the committee as having a reasonable probability of being selected for award. The Proposers for this 'short-list' of Proposals will be invited to meet with the committee. Proposers shall make arrangements to attend the interviews, presentations, and/or demonstrations if invited. The interviews, presentations, and/or demonstrations are closed to the public to the extent permitted by law.



The evaluation committee may final rank Proposals without conducting clarifications, interviews, presentations, and/or demonstrations. Therefore, each Proposer must ensure that its Proposal contains all the information requested.

**B.04 BEST AND FINAL OFFER (BAFO)**

The County may request a BAFO if additional information or modified Proposals are necessary for the evaluation committee to complete its evaluation and ranking. The information received from the BAFO will be used by the evaluation committee to re-evaluate and re-rank the Proposers.

**B.05 RANKING OF PROPOSALS**

The evaluation committee will determine, from the responses to this RFP and subsequent investigation as necessary, the Proposer(s) whose Proposal(s) best meet the County's requirements and recommend the County enter into negotiations for an agreement.

In its review, the evaluation committee may take the following actions:

- a. Review all responses pursuant to the evaluation factors stated herein;
- b. Short list Proposers to be further considered in oral interview/presentation/product demonstrations;
- c. Recommend commencement of negotiations to County Administrator;
- d. Reject all Proposals received and cancel the RFP; and
- e. Receive written clarification of Proposals.

**END OF SECTION B**

## **SECTION C, NEGOTIATION OF THE AGREEMENT**

### **C.01 GENERAL**

- a. The Proposal will serve as a basis for negotiating an agreement.
- b. Upon submission, all Proposals become the property of Manatee County which has the right to use any or all ideas presented in any Proposal submitted in response to this RFP whether, or not, the Proposal is accepted.
- c. All products and papers produced by Proposer and submitted to the County during the solicitation process become the property of Manatee County.

### **C.02 NEGOTIATION**

The evaluation committee will make a recommendation as to the Proposer which the County should enter into negotiations, if any. Upon approval of the recommendation, the successful Proposer will be invited to enter negotiations led by the County Procurement Division. These negotiations are generally relative to the scope of work/services to be provided and any associated costs.

The County will publicly notice the Intent to Negotiate prior to commencing negotiations as required by law and policy.

### **C.03 RECOMMENDATION FOR AWARD**

Upon successful completion of negotiations, a recommendation for award to the successful Proposer(s) will be presented for approval per County ordinances, policies and procedures.

### **C.04 AGREEMENT**

The successful Proposer(s) will be required to enter into an agreement in a form and with the terms and conditions contained in Exhibit 3, Sample Agreement, attached hereto. The agreement may, or may not, include all elements of this RFP or the resulting successful Proposer's Proposal where alternatives provide best value, are desirable to the County, and the parties agree to such terms.

### **C.05 AWARD**

The County does not make award to a Proposer who is delinquent in payment of any taxes, fees, fines, contractual debts, judgments, or any other debts due and owed to County, or is in default on any contractual or regulatory obligation to County. By submitting this solicitation response, Proposer attests that it is not delinquent in payment of any such debts due and owed to County, nor is it in default on any contractual or regulatory obligation to County. In the event the Proposer's statement is discovered to be false, Proposer will be subject to suspension and/or debarment and County may terminate any contract it has with Proposer.

Award of an agreement is subject to the approval of either the Procurement Official or the Board of County Commissioners, as provided for in the current Manatee County Procurement Code.

## **END SECTION C**

## **EXHIBITS**

Exhibit 1, Scope of Services

Exhibit 2, Proposal Response Requirements

## EXHIBIT 1, SCOPE OF SERVICES

### 1.01 GENERAL BACKGROUND INFORMATION

Manatee County, a political subdivision of the State of Florida (hereinafter in this Scope referred to as County), is seeking proposals from qualified companies to perform a high-level discovery and requirements definition project to replace their current Time & Attendance and Leave Management platforms with a cloud-based technology platform.

The County consists of 2,025 authorized permanent positions with approximately 1,900 employees, including both hourly and salaried employees. The County seat and the largest municipality in Manatee County is Bradenton. The County has five (5) other municipalities, including the City of Anna Maria, Bradenton Beach, Holmes Beach, the Town of Longboat Key, and Palmetto.

The purpose of this RFP is to identify and engage a technology solution partner to provide the County with a cloud-based technology solution that includes the following required functions:

1. Time and Attendance
2. Leave Management

The solution should also provide Employee Self Service, Manager Self Service, a Document Cloud, and Ad Hoc Reporting Tools as standard across the platform where appropriate.

It should be noted that payroll is not part of the scope of this project and the selected Proposer (hereinafter in this Scope referred to as Consultant) will be expected to create bi-directional data interfaces with **CentralSquare ONESolution/Finance Enterprise** (County's Enterprise Resource Planning (ERP)/Payroll System) to achieve maximum performance. The County's Human Resources (HR) team provides benefits services for other Constitutional Agencies including the Manatee County Clerk, Manatee County Sheriff's Office, Manatee County Property Appraiser, and the Manatee County Tax Collector which is also not part of the scope for this engagement.

The Time & Attendance and Leave Management platform will need to support English and Spanish (optional) technology.

NOTE: Technology service providers/vendors and applications are indicated in **bold** throughout this document.

### 1.02 HUMAN RESOURCES TECHNOLOGY BACKGROUND INFORMATION

The table below consists of the County's current business process functions and supporting technology platforms, along with the future considerations for potential technology replacement as part of the requirements process. The areas highlighted in green are those that are part of the scope, all other areas are for informational purposes.

Business Process / Function	Description (not meant to be all inclusive)	Current System in Place Today	Future Consideration
Time and Attendance (PTO)	Recording of hours for pay and/or statistical purposes and PTO accruals/tracking, paid time-off approvals	<ul style="list-style-type: none"> <li>• Workforce Software (now)</li> <li>• Aladtec (shift scheduling) only for hurricane events - used for employee notification primarily)</li> </ul>	Required-In Scope
Leave Management	Leave tracking	<ul style="list-style-type: none"> <li>• Manual</li> </ul>	Required – In Scope
Payroll Processing	Gross to net calculations for pay, paycheck creation, deductions (all types), calculate stored and passed tax data to government agencies	<ul style="list-style-type: none"> <li>• Central Square Finance Enterprise Payroll</li> </ul>	Not in Scope

### 1.03 SCOPE

The Consultant shall furnish all equipment, labor, materials, supplies, licensing, transportation, and other components necessary to provide a Time & Attendance and Leave Management System that will meet the requirements of the Agreement.

### 1.04 GENERAL REQUIREMENTS

The Consultant shall provide the following requirements:

1. A relationship based on the spirit of partnership with a high level of transparency.
2. Flexibility with quick response time.
3. A highly secure technical, cloud-based environment that ensures protection of the County’s employee data.
4. A system that is technologically advanced, rules-based, and user friendly to the end user.
5. A system whose cost of ownership (acquisition, implementation, and ongoing support) is appropriate for a public entity.
6. A high level of customer service to the County, including a highly knowledgeable service center for the County’s managers and administrators.
7. Administrative efficiencies.
8. Proactive issue management processes.
9. Thoroughly documented policies and procedures with continuous updates as needed.
10. Timely and accurate transaction processing backed up by industry standard service level agreements.
11. Easy access to data for reporting and analysis purposes.
12. Strategic guidance and adherence to industry standard best practices.
13. Adherence to applicable regulations (i.e., U.S. Department of Labor [DOL]).

### 1.05 SERVICE REQUIREMENTS

The Consultant shall replace the County’s current Time & Attendance system and provide a new Leave Management capability that includes, but is not limited to the following:

#### 1. TIME AND ATTENDANCE – DESIRED STATE

## 1.1 TIME OVERALL – DESIRED STATE

The functionality of the current software does not meet the current needs of the County as it is a very old version of software; therefore, the new technology platform should have the capability to:

- a. Support the primary objectives that the County is seeking to accomplish with a Time and Attendance and Leave solution including:
  - i. Clock-in / clock-out time tracking with various interfaces (mobile, web, clock).
  - ii. PTO/Vacation time-off processing requests with approval workflows and capability to have delegated manager roles when needed.
  - iii. Capability to effectively administer multiple schedule variations and multiple pay codes with corresponding rules.
  - iv. Track leave submissions approvals for compliance with required laws (FMLA, Military Leave, etc.).
  - v. Reporting capabilities – ability to pull reports based on specific hour code, or multiple hour codes over a given time-period.
  - vi. Interface with **CentralSquare Finance Enterprise** payroll through an Application Programming Interface (API) connection.

## 1.2 TIME – DESIRED STATE

The new technology platform should have the capability to:

- a. Allow employees to enter timesheet data and submit for approval via computer/web and mobile.
  - i. 1,500 non-exempt employees and 400 exempt employees need to record their time (configurable as needed by employee type and schedule). (currently bi-weekly).
- b. To leverage a facility badge system in the future, preferably a system that will integrate with our current badges or one which only requires EEs to enter their M00#.
- c. Provide a mobile application for time recording, time approval, call-in, etc. that supports multiple time clock options for the County to choose from.
  - i. Mobile time entry will require geo-fencing and geo-positioning parameters to allow employees to record time only in approved locations and for audit purposes.
- d. Support for employees to swap schedules with manager approval (currently over 100 time shift schedules need to be supported).
- e. Support job costing for where hours are to be allocated.
- f. Provide systematic notifications to an employee of a missed punch (system generated).
- g. Support managers to edit or approve time for other managers while out on leave (delegation rules).
- h. Allow managers or supervisors to view and edit timesheet details for current/previous periods as well as complete attendance history for all

authorized employee groups, especially for those employees transferring to new managers (currently a manual paper process).

- i. Support all non-time clock employees with access to a pre-populated timecard with their scheduled hours (currently performed in existing software).
- j. Monitor part-time employees to ensure they are not working more than 29 hours per week and therefore become designated as full-time employees for benefit purposes.
- k. Support overtime rules and compliance with the Fair Labor Standards Act (FLSA). Support configurable stand-by or on-call hours where an employee who is on-call for a specified number of hours (“x” or more consecutive hours) and is awarded an amount of straight time pay for having been on-call. In addition, the paid hours must be included in remuneration for the overtime calculation. This must be configurable by workflow rules and not require systematic programming or a “systematic update.”
- l. Support retro adjustments or other systematic updates for configurable rules to be processed through the system with an audit trail of changes made at a point in time.
- m. Schedules should have the option to not be treated as actual hours worked for non-exempt EEs which they currently are.
- n. Exempt employees with no pay code entries outside regular time (vacation, sick, etc.) and free of exceptions should be auto-80 (mass approved) and not require employee submission or supervisor approval.
- o. Time off requests for exempt EEs within the pay period already require review and approval by supervisors, these timesheets should be added to the mass approval, requiring a second approval from the supervisor is unnecessary.
- p. Manager tools – Quick Shifts (pre-determined shifts that can either be Click/Drag/Dropped or EEs can be added to). Example: EE works 8am-5pm MWF and 7am-4pm T/TR.
- q. The setup of multiple positions for employees must be available where positions can tie into different PTO accrual methods, be compliant with applicable FLSA guidelines, and be configured with different cost labor distributions.

### **1.3 PTO AND OTHER FORMS OF TIME OFF – DESIRED STATE**

The new technology platform should have the capability to:

- a. Support effective dating for time off requests and process pay according to accrued balances at the time of payment if the request has been manager approved.
- b. Support multi-dimensional time calculations/qualifiers that are effective dated via workflows and not hard coded programming requiring the provider’s/vendor’s intervention.
- c. Enable managers to view accruals and balances for all employee groups based on the time off policies.

- d. Enable employees to view accrual balances to include the history of what was taken and when. Also, accrual projections.
- e. Support employees' PTO and Leave of Absence requests and associated manager workflows. Currently defined as below but the list is not exhaustive and is subject to change:
  - i. Vacation – accrues based upon role and years of service.
  - ii. Personal Sick Time – accrues each pay period.
  - iii. Personal Holiday – three (3) scheduled days per calendar year usable only in full work day increments.
  - iv. Family Sick Time – up to 80 hours available per calendar year to care for sick family members and impacts personal sick time accrual balances.
  - v. Manatee County Comp Time in Lieu of Overtime Pay – elected by the employee following OT/Manatee County Comp Time in Lieu of Overtime Pay approval from his/her manager.
    - Manatee County Comp Time in Lieu of Overtime Pay is credited to this accrual at the rate of 1.5 x the number of overtime hours worked and approved for Manatee County Comp Time in Lieu of Overtime Pay for that period.
  - vi. PRIDE hours (Proudly Recognizing Innovative and Dedicated Employees).
    - Manager awarded time that is added to an accrual by HR admin for the employee to use as desired.
  - vii. Veteran Leave (time off tracking) – allotted at six (6) days/occurrences per calendar year for military veterans to care for an identified disability.
  - viii. Military Call (time off tracking) – short term for training, up to 30 days, similar to FMLA.
  - ix. Military Leave (time off tracking) - have to give 17 days of regular pay per year, up to five (5) years, need to keep position open.
  - x. Vacation Awards are granted as a typical work day (8, 12 or 24 hours), depending on annual schedule hours of time if the employee has not taken sick time over 13 consecutive pay periods (per personnel policy).
- f. Support Special time categories, currently defined as:
  - i. Personal Medical Leave (PMAL). This is time not accrued but may be taken to use for medical appointments and dental appointments such as preventative care and is deducted from Sick Accruals, or Vacation Accruals or Comp Accruals. This would be accounted for in the earnings codes for the Payroll System but need to be reflected in the Time and Attendance System. When using this code and sick hours, eligibility for the Vacation Award is not affected.
  - ii. Weather Emergency Pay which is processed at 1.5 x base rate for non-exempt employees and 1.0 x hourly equivalent for exempt employees. For EMS 24/48 is at 2.0 x base rate.



- iii. Holiday worked which is processed at 1.5 x base rate for non-exempt employees.
  - All accruals apart from Personal Holiday may be taken in 15-minute increments.
- g. Support managers to view staff availability.
- h. Support employees to be able to view their work time schedule from a mobile device with possible reminders to ensure they do not miss their scheduled work hours.
- i. Prevent any employee from going negative for accrued time.
  - i. The system needs to identify when sufficient PTO time is accrued and eligible to be taken (i.e., the system should not allow the accrual amount to be used in the period it is earned).
- j. Support rules that differentiate between Premium Pay/Shift Differential so that overtime is correctly calculated.
- k. Support all timesheet audit requests with an automated record of events and the user who executed the action via the reporting system or standard audit outputs.
- l. Provide a scheduling tool/calendar view for the employees that are approved for PTO/Leave during a designated time period. Integration with Outlook (feed to standard email and mobile calendar applications).
  - i. Allow for employee view of the calendar to identify who is approved for PTO for designated dates and times.
  - ii. Support resource planning to identify resources capable to fill a shift in an automated fashion.
- m. Provide configurable automation of accrual limits, roll-overs, and conversion of time.
- n. Support scheduling for EMS/911 and other parts of the County as deemed necessary.
- o. Follow Holiday hour coding validation, not allowing holiday codes to be added on a non-holiday.
- p. Holiday worked hour coding only on a designated holiday. Support different accrual rates for different employees based on years of service and/or schedule.
  - i. Current state:
    - 0-5 Years: 5 Hours /Pay Period
    - 6-10 Years: 6 Hours/Pay Period
    - 11+ Years: 7 Hours/Pay Period
- q. Vacation Accrual Rollover Policy that must be supported and allow for changes by rule, not hard coding:
  - i. Allow 400 hours max of accrual.
  - ii. If over 400, extra hours are rolled over to sick time at end of year.
  - iii. Exceptions Union and potentially the County Administrator.

#### **1.4 PAYROLL PROCESSING – DESIRED STATE**

The functionality of **CentralSquare Finance Enterprise** payroll capabilities is used as the Payroll System by the Manatee County Clerk’s office to process the

bi-weekly payroll for the County. It is a critical expectation that the Consultant develops ongoing, bi-directional data interfaces with the **CentralSquare Finance Enterprise** Payroll System to effectively ensure employees are paid accordingly.

## 2. LEAVE MANAGEMENT – DESIRED STATE

The new technology platform should have the capability to:

- a. Support workflow approval processes for leave requests initiated by the employee or manager.
- b. Support determining eligibility for the leave based upon qualification criteria, (i.e., to be eligible for FMLA the employee must have worked for one (1) year or more and not taken FMLA during the 12-month period and worked a minimum of 1250 hours).
- c. Track FMLA including intermittent leave, concurrently with time off accruals.
  - i. Report on FMLA status including intermittent leave, based on rules established.
  - ii. Track due dates of Certification of Healthcare Provider Form (form that is filled out by a health care provider and provided to the employer to establish a patient or family member's medical condition that requires FMLA - protected leave by employee).
- d. Track Military Call Leave – short term for training, up to 30 days, similar to FMLA.
- e. Track Military Leave - have to give 17 days of regular pay per year, up to five (5) years, need to keep position open.
- f. Track Short-Term Disability Leave.
- g. Track the approved date when the employee's leave of absence is expected to start.
- h. Track the approved date when the employee is expected to return from the leave.
- i. Support the calculation of eligible hours for the classification of employee (e.g., 8, 10, 12-hour employee categories).
  - i. For example, an 8-hour employee would max out of leave balances at 480 hours, a 12-hour employee would max out at 528 hours, and a 24/48-hour employee would max out at 672 hours during a 12-week review period.
- j. Display warning messages during pay processing if time entered exceeds the leave balance.
- k. Display error messages/don't allow saving time sheet if duplicate time or overlapping time is entered.
- l. Warning messages or exceptions should display as an exception needing to be cleared during supervisor's review/approval before going to payroll.
- m. Automated e-mails to supervisor regarding pending PTO requests within the pay period.
- n. Rules for Eligibility Notes:

- i. Union has different rules for accruals based on years of service.
- ii. 12-hour employees managed differently than 8-hour.

### 3. REPORTING AND ANALYTICS – DESIRED STATE

#### 3.1 IT

The new technology platform should have the capability to:

- a. Support retention of personnel files for 25 years in accordance with Florida law within the System and/or **OnBase** (required system of record) on a scheduled and/or workflow driven basis.
- b. Support various integration methods and encryption for the protection and movement of data.
- c. Utilize **Active Directory** for user logon.

#### 3.2 Reporting

The new technology platform should have the capability to:

- a. Provide role-based security to ensure the report creator (and/or receiver) can only see data to which they are entitled.
- b. Support a fiscal calendar parameter versus a regular annual calendar.
- c. Provide customizable real-time reporting and analytics capabilities.
- d. Provide a library of standard (out of the box) reports such as census, overtime, etc.
- e. Provide a custom report writer with user-definable fields, such as:
  - i. Employee staffing levels.
  - ii. “Right to Work” (Florida is both an “At Will” work state and a “Right to Work” state).
- f. Allow reports to be sorted by:
  - i. Calendar year, fiscal year, “as of” custom date ranges.
  - ii. Location, site, business unit, employee, pay date, etc.
- g. Support required compliance reporting (i.e., EEOC, Workers Compensation, Vets 100, etc.).
- h. Allow users to export reports from the platform into a variety of file formats (i.e., export to Excel, Word or PDF) while maintaining role-based security at all times.
- i. Allow users to schedule reports from the platform and deliver via Outlook or an in-platform dashboard in accordance with role-based security.
- j. Allow users to customize dashboards, with drill down capability, based on their preferences and requirements.
- k. Allow administrators to create, manage, and share custom dashboard views that can be further configured and shared between users with the same security profiles to provide relevant views into data and trends.
- l. Allow users to perform multi-dimensional trend analysis, complex calculations, and data modeling.

- m. Support a Data Warehouse capability via ODBC drivers, APIs, or SSO if desired by the County to move data to a reporting engine like Power BI or Tableau, etc.

### **3.3 Analytics**

The new technology platform should have the capability to:

- a. Support Descriptive (what has happened), Predictive (what could happen), and Prescriptive (what should we do) analytics.
- b. Allow users to create a visual (graphic) representation of the data.

## **1.06 ACCESSIBILITY**

The Consultant shall ensure all of its electronic information, documents, applications, reports, and deliverables required under the Agreement are in a format that meets the requirements of Section 504 of the Rehabilitation Act and best practices (W3C WCAG 2).

Where not fully compliant with these requirements and best practices, the Consultant shall provide clear points of contact for each document and information technology to direct users in how to obtain alternate formats. Further, the Consultant shall develop accommodation strategies for those non-compliant resources and implement strategies to resolve the discrepancies.

**END OF EXHIBIT 1**

## **EXHIBIT 2, PROPOSAL RESPONSE REQUIREMENTS**

This section identifies specific information which must be contained within the Proposal and the order in which such information should be organized. The information each Proposer provides will be used to determine those Proposers with the background, experience, and capacity to perform the scope of services as stated in this RFP and which Proposer best meets the overall needs of the County. For more information on the evaluation process, refer to the RFP, Section B, Evaluation of Proposals.

### **2.01 INFORMATION TO BE SUBMITTED**

The contents of each Proposal must be organized and arranged with tabs in the same order as listed below, with the same tab numbers. The Proposal must contain sufficient detail to permit the County to conduct a meaningful evaluation. However, overly elaborate responses are not requested or desired.

### **2.02 PROPOSAL FORMAT**

The contents of the Proposal package must include one (1) bound original, four (4) bound copies, and one (1) electronic copy.

NOTE: The electronic copy must be submitted on a USB drive in Microsoft Word format in one (1) file that includes all required tab numbers as shown below in a continuous file. The electronic copy of Attachment J, Fee Forms must be submitted on the same USB in Microsoft Excel format. Do not submit the Proposal in separate files for each tab number. Do not password protect or otherwise encrypt electronic submissions. For more information regarding submission of Proposals, refer to the RFP, Section A.03, Submission of Proposals.

#### **1. TAB 1 – INTRODUCTION**

In Tab 1, include the following:

- a. A cover page that identifies the Proposer, the RFP by title and the RFP number.
- b. An introductory letter/statement that describes your Proposal in summary form (limit 2 pages).
- c. A table of contents.

#### **2. TAB 2 – MINIMUM QUALIFICATION REQUIREMENTS**

In Tab 2, submit the information and documentation requested that confirms the Proposer meets the following minimum qualification requirements:

- a. The Proposer must be registered with the State of Florida, Division of Corporations to do business in Florida.

**No documentation is required. The County will verify registration.**

- b. The Proposer has provided a Time & Attendance and Leave Management System for at least three (3) clients since September 1, 2015.

**Provide the following information for the three (3) qualifying clients:**

- i. **Name of client**
- ii. **Location (city/state)**
- iii. **Client contact name**
- iv. **Contact phone**
- v. **Contact email**
- vi. **Service dates (start/end)**
- vii. **Components**

- c. The Proposer is not listed on the Florida State Board of Administration Scrutinized List of Prohibited Companies.

**No documentation is required. The County will verify.**

- d. The Proposer is not listed on the Florida Suspended, Debarred, Convicted Vendor List.

**No documentation is required. The County will verify.**

- e. The Proposer has not been convicted of a public entity crime per Section 287.133, Florida Statutes or environmental law in the past five (5) years.

**The Proposer must complete Attachment C and submit with its Proposal attesting that it has not been convicted of a public entity crime or environmental law in the past five (5) years.**

- f. If the Proposer is submitting as a joint venture, the Proposer must file the required documents with the Florida Department of Business and Professional Regulation as required by Section 489.119, Florida Statutes, prior to the Due Date and Time.

**If the Proposer is a joint venture, provide a copy of the Proposer's approved filing with the Florida Department of Business and Professional Regulation. If the Proposer is not a joint venture, provide a statement to that effect.**

- g. The Proposer has no reported conflict of interests in relation to this RFP.

**The Proposer must complete Attachment E and submit with its Proposal attesting that it has no reported conflict of interests in relation to this RFP. If applicable, the Proposer must disclose the name of any officer, director, or agent who is also an employee of the County; and**

**disclose the name of any County employee who owns, directly or indirectly, any interest in the Proposer's firm or any of its branches.**

**3. TAB 3 – FORMS**

In Tab 3, provide the following completed and executed Attachments that are included in the RFP:

- a. Attachment A, Acknowledgement of Addenda
- b. Attachment B, Proposal Signature Form
- c. Attachment C, Public Contracting and Environmental Crimes Certification
- d. Attachment D, Insurance Requirements and Statement
- e. Attachment E, Affidavit of No Conflict
- f. Attachment F, Capabilities Questionnaire
- g. Attachment G, General Questionnaire
- h. Attachment H, Specific Questionnaire
- i. Attachment I, Response Components Form
- j. Attachment J, Fee Forms

**4. TAB 4 - TRADE SECRETS**

In Tab 4, pursuant to the RFP, Section A.27, Trade Secrets, identify any trade secret being claimed. **NOTE: Designation of the entire Proposal as “Trade Secret”, “Proprietary” or “Confidential” is not permitted and may result in a determination that the Proposal is non-responsive and therefore will not be evaluated or considered.** The Proposer must submit purported trade secret information as follows:

- a. Trade secret material must be segregated in a separate document from the portions of the Proposal that are not being declared as trade secret. NOTE: Trade secret requests made after the Due Date and Time are not allowed.
- b. The Proposer shall cite, for each trade secret claimed, the Florida Statute number which supports the designation. Further, the Proposer shall include with its Proposal a brief written explanation as to why the cited Statute is applicable to the information claimed as trade secret.
- c. The Proposer shall provide an additional hard copy and electronic copy of its Proposal that redacts all designated trade secrets.

**5. TAB 5 - PROPOSER STATEMENT OF ORGANIZATION**

In Tab 5, provide information and documentation for the Proposer as follows:

- a. Legal contracting name including any Doing Business As (DBA) names.
- b. State of organization or incorporation.
- c. Ownership structure of the Proposer's company. (e.g., Sole Proprietorship, Partnership, Limited Liability Corporation, Corporation).
- d. Federal Identification Number.
- e. A fully completed (signed and dated) copy of the Proposer's W-9.

- f. Contact information for the Proposer’s corporate headquarters and local office. NOTE: local is defined as Manatee, DeSoto, Hardee, Hillsborough, Pinellas, and Sarasota counties. Include the following:
  - i. Address
  - ii. City, State, Zip
  - iii. Phone
  - iv. Number of years at this location
- g. List of officers, owners and/or partners, or managers of the firm. Include names, addresses, email addresses, and phone numbers.
- h. Contact information for the Proposer’s primary and secondary representatives during this RFP process to include the following information:
  - i. Name
  - ii. Phone
  - iii. E-mail
  - iv. Mailing Address
  - v. City, State, Zip
- i. Provide a brief summary regarding any prior or pending litigation, either civil or criminal, involving a governmental agency or which may affect the performance of the services to be rendered herein, in which the Proposer, any of its partners, employees, or subcontractors is or has been involved within the last three (3) years.
- j. Provide details of any ownership changes to the Proposer’s organization in the past three (3) years or changes anticipated within six (6) months of the Due Date and Time (e.g., mergers, acquisitions, changes in executive leadership).

**6. TAB 6 – PROPOSER AND TEAM’S EXPERIENCE**

In Tab 6, provide details of the Proposer and its team’s experience to include the following:

- a. Provide a summary of the Proposer’s background, size and years in business.
- b. Provide the Proposer’s years of experience in Time & Attendance and Leave Management System services, particularly for other government agencies in Florida.
- c. Identify and include information regarding experience and qualifications of the Proposer’s key staff (e.g., project lead, managers, supervisors) to be assigned to the services. Include a resume for each with their full names, the name of the firms for their current and previous employers, professional credentials (e.g., certifications and/or licenses), and roles and duties which the individuals will provide to the County. Include the address of their current primary office location, email address, and phone number.
- d. Identify any proposed subcontractors to accomplish the work. Include the name of the individuals to be assigned, and an overview of their experience and qualifications related to Time & Attendance and Leave Management



System services.

- e. Describe any significant or unique accomplishments or recognition received by the Proposer or its subcontractors in previous similar services.
- f. Provide a minimum of three (3) client references for which the Proposer has provided services, similar in scope as defined in this RFP, who are agreeable to responding to an inquiry by the County. References from government agencies are preferred; a minimum of one (1) reference must be from a government agency. References should include the following information:
  - i. Client name
  - ii. Client address
  - iii. Client contact name
  - iv. Client contact phone number
  - v. Client contact email address
  - vi. Brief description of all services provided (1-2 sentences)
  - vii. Performance period (start/end dates)
  - viii. Total dollar value of contract

## **7. TAB 7 – CAPACITY**

In Tab 7, provide the following information regarding the Proposer’s capacity for the provision of services:

- a. Specify the location(s), including the complete physical address, where the work for these services will be performed, including work performed by subcontractors, if applicable.
- b. Details of the Proposer’s staffing resources, at the location that will provide services to the County as well as corporately, by discipline and the number of personnel within each discipline.
- c. If the Proposer’s staffing resources includes subconsultants, submit the name of the firms who will perform each discipline. Detail how subcontractors will be used and to what extent.
- d. An organizational diagram clearly identifying key personnel who are designated to provide services to the County and indicate their functional relationship to each other.
- e. Describe the Proposer’s plans, policies, and/or strategies in which County citizens would receive consideration for employment and County suppliers of goods and services that would be utilized.
- f. If the Proposer is teaming with other entities to provide the required goods and services, detail any prior similar work any two (2) or more team members have jointly performed.
- g. If a joint venture is proposed, provide an affidavit attesting to the formulation of the joint venture and provide proof of incorporation as a joint venture or a copy of the formal joint venture agreement between all joint venture parties, indicating their respective roles, responsibilities, and levels of participation in the project.
- h. An explanation, in general terms, of the Proposer’s financial capacity to perform the scope of services. If the Proposer is jointly filing a Proposal

with other entities, details must be provided to demonstrate financial capacity of each entity.

- i. Provide a statement on company letterhead, signed by a company official, authorizing a County auditor and/or financial analysts access to your financial records, including all records prepared by an independent firm, or the financial records of other entities for which you have ownership interest. Such access will occur at the primary location of the Proposer, or such other location as may be agreed, for the purposes of verifying financial representations, and/or to review and assess the historical and current financial capacity of the Proposer's business entity and its expected ability to meet ongoing financial obligations related to the required services, if awarded a contract. If an audit is conducted, the County's audit and/or financial analysts will report their findings in a summary report to the Procurement Official, which will be placed in the proposal files for subsequent use, review, and discussions during evaluations.
- j. Disclose any ownership interest in other entities proposed for services. This ownership disclosure includes ownership by the Proposer through a parent, subsidiary or holding company, or any other form of business entity. Submit entity names and the percent of ownership for each.
- k. Detail of the Proposer's and any subcontractor's current workloads and any projected changes to the workload within the next six (6) months.

## **8. TAB 8 – APPROACH**

In Tab 8, provide the Proposer's project approach to include the following:

- a. A narrative of the Proposer's approach to project management and the provision of services.
- b. Details of implementation plan and schedule for work specified.
- c. Detailed project schedule for managing the tasks identified in Exhibit 1, Scope of Services.
- d. A narrative that clearly demonstrates the Proposer's ability and willingness to meet response/schedule times and budget requirements.
- e. A narrative of the proposed approach and methodology for engaging with County representatives in-the-course of performing the duties.
- f. The Proposer shall thoroughly explain:
  - i. Its accessibility in the areas of availability for meetings, general communications, coordination, and supervision.
  - ii. How the Proposer physically plans on attending pre-scheduled meetings.
  - iii. How the Proposer plans on ensuring accessibility and availability during the term of the Agreement.
- g. The Proposer's Risk Management Plan that includes a list of risks related to the provision of services, the potential consequences or impact of each (e.g., cost, schedule, technical), and the Proposer's proposed mitigation procedures for each item.
- h. Describe the training to be provided to County staff. Include details of how

the training will be provided (e.g., on-site classroom, on-line with instructor, on-line self-paced). Provide examples of similar training plans utilized on other projects.

## **9. FEES PROPOSAL**

The Proposer must use Attachment J, Fee Forms for submitting its Fees. Attachment J includes the following forms:

- a. Form No. 1 – Instruction Overview
- b. Form No. 2 – EE Demographics & Data Files
- c. Form No. 3 – Total Services
- d. Form No. 4 – Implementation
- e. Form No. 5 – Ongoing
- f. Form No. 6 – Standard Caveats
- g. Form No. 7 – Nonstandard Caveats
- h. Form No. 8 – Input Data

The Proposer must submit one (1) electronic copy of Attachment J, Fee Forms in Microsoft Excel format on a USB drive and one (1) original hard copy in a separate envelope labeled “Fees” with the Proposer’s name clearly marked on the outside of the envelope. Include the Proposer’s Fee Forms with the original hard copy of the Proposal response. Do not include a copy of the Fee Forms in the duplicate hard copies.

**END OF EXHIBIT 2**

## **ATTACHMENTS**

Note: Separate Attachments

Attachment A, Acknowledgement of Addenda

Attachment B, Proposal Signature Form

Attachment C, Public Contracting and Environmental Crimes Certification

Attachment D, Insurance Requirements and Statement

Attachment E, Affidavit of No Conflict

Attachment F, Capabilities Questionnaire

Attachment G, General Questionnaire

Attachment H, Specific Questionnaire

Attachment I, Response Components Form

Attachment J, Fee Forms