TIME CLOCK SYSTEM PROPOSAL #19004 TECHNICAL RESPONSE

Prepared for:

WHERE LEARNING LEADS THE WAY
BEAUFORT COUNTY SCHOOL DISTRICT

Submitted on:

10/31/2018

Submitted by:

Len Ferraro

National Channel Sales Manager (North America)

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LEGAL NOTICES

WorkForce Software believes that it is in the best interest of Beaufort County School District that a comprehensive, definitive requirements listing with appropriate, negotiated contract language be developed and relied upon to engage the successful vendor. This is because Beaufort County School District, as a direct result of the bidding process, may change, add or delete requirements. In this way, both Beaufort County School District and WorkForce Software, will understand the contractual terms and conditions under which those requirements are to be met. If chosen as the successful vendor, WorkForce Software will be happy to engage Beaufort County School District in a discussion regarding contractual terms.

WorkForce Software has attached its standard agreements to the RFP for review and consideration by Beaufort County School District. To the extent anything contained in the attached WorkForce Software agreements differs from any contractual terms contained in the RFP, WorkForce Software reserves the right to negotiate, and welcomes the opportunity to discuss, such terms in order to reach an agreement acceptable to both Beaufort County School District and WorkForce Software. WorkForce Software is also willing to discuss the inclusion of certain sections of the RFP into the final agreement if such inclusion is a requirement of the RFP.

Notwithstanding anything to the contrary in the RFP, its attachments, or the WorkForce Software response to the RFP, the WorkForce Software response constitutes neither an offer to contract nor acceptance of the RFP contractual terms. Therefore, no contractual relationship shall exist between the parties until the execution of a final, fully-negotiated agreement.

By receiving this information, you agree to keep this information confidential. It may not be duplicated in any way without the express written consent of WorkForce Software, except that you are given permission to duplicate it in electronic or printed form solely for the purpose of distribution for evaluation of our software for your internal use. Distribution should be limited to those employees and/ or consultants who are directly involved in evaluating our solution for your internal use.

In the absence of a non-disclosure, confidentiality or similar agreement, WorkForce Software may mark pages within this response as 'Confidential'. **Exhibit B – Cost Proposal** and **Attachment 1 – WorkForce Software Financial Statement** are _confidential trade secrets_ of WorkForce Software. We respectfully request that they _should not be disclosed_ under any Public Records Act, Freedom of Information Act, or similar statute. We have provided these items to you so that you may fully consider our proposal. However, they contain sensitive financial and/or technical information on our company and products that is generally not known in the market, including financial information and trade secrets which are protected under relevant statutes in your jurisdiction. This information, if disclosed, would cause irreparable harm to WorkForce Software. Pursuant to the relevant statutes, we request that, prior to any disclosure of these pages, you notify WorkForce Software so that we may intervene and challenge such requests in court.

11/9/2018

Re: Request for Proposal (RFP) - Beaufort County School District

Dear Sandi:

Thank you for the opportunity to respond to your request for proposal (RFP). Based on a clear understanding of Beaufort County School District's goals and requirements, I am pleased to introduce the WorkForce Suite. This cloud-based workforce management solution aligns with your specific needs by providing:

- Real-time visibility across your entire workforce — including salaried, hourly, and contingent workers

- Reduced labor costs by eliminating errors and digitizing complex pay rules with 100% accuracy

- Diverse data capture options for every employee group and working environment

- Simplified compliance with labor laws and district policies

- Easy-to-use self-service tools, including mobile capabilities and flexible, transparent accrual tracking

- Compliance with union rules and collective bargaining agreements

- Simplified absence and leave management, including eligibility determinations

- Full integration with your organization's ERP, payroll, and core HR systems

As an industry leader, WorkForce Software takes pride in making work easy for your entire workforce. We offer:

- **Packaged domain expertise** – With more than 300 pre-built templates, we'll help you quickly and confidently demonstrate compliance with 400+ national and local regulations. Our solutions are **currently** being used by more than 2 million people across 1,100+ organizations and 60+ countries, and our global presence continues to grow.

- **Proven flexibility –** Our solution can integrate with any HCM/Payroll system and we support numerous data capture options including timeclock hardware, web interface and smartphones. Cloud delivery makes it easy to scale as your business grows, contributing to our 97% customer retention rate.

- **Exceptional SaaS security** – WorkForce Software maintains the highest levels of physical and network security. Independently audited for ISO 27001, SSAE-16 Type II, ISAE 3402 Type II and SOC 2 Type II certifications, and certified under the EU-U.S. Privacy Shield Framework, our SaaS solution meets the industry's most stringent requirements and consistently maintains leading uptime and system performance figures.

- **Perpetual innovation** – We offer three seamless updates per year to keep up-to-date with the latest innovations. Each time a new update is released, we provide separate production and test environments so you can test configuration changes prior to rollout.

- **Worry-free administration** – Our expert cloud hosting team keeps everything running smoothly in our constantly-monitored network of global data centers. And with SaaS deployment, one low, predictable per-employee subscription fee covers all software, hardware, maintenance, and support.

Again, I thank you for the opportunity to respond to your RFP and present the WorkForce Suite. Based on the requirements you have outlined, I believe it is a superior solution to meet your stated needs. Following your review of this proposal, I look forward to engaging in a deeper evaluation process with , including additional discovery and product demonstrations, to confirm that the WorkForce Suite meets your needs and exceeds your expectations. For any questions, please contact you Len Ferraro at lferraro@workforcesoftware.com or (585) 309-3905.

Regards,

Bob Feller

Chief Financial Officer

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Attachments

Attachment 1 – WorkForce Software Financial Statement – **CONFIDENTIAL**

Attachment 2 – WorkForce Data Collection Terminals

Attachment 3 – WorkForce Software SaaS Agreement

Attachment 4 – WorkForce Software Hardware Rental Schedule

Attachment 5 – Signed Addenda

Executive Summary

Time and labor processes — the methods you use to track work hours and activities, calculate pay rates, and respond to absences and schedule changes — are some of the most critical to get right. They shape your cost of labor, directly impact employee productivity and satisfaction, and have a measurable impact on revenue creation.

Yet, time and labor processes are inherently complex. A litany of factors, from national regulations, industry practices, regional policies, and union rules, must be accounted for in system and process design. A wide variety of users need to be accommodated, and the solution needs to integrate smoothly with other systems, starting with your HRIS and payroll tools. With all of these factors in play, the success of your project depends not only on the solution you choose, but also on selecting the right vendor to partner with.

Why Choose WorkForce Software

WorkForce Software is dedicated to making work easy for the connected workforce around the globe. We have been providing enterprise and mid-sized organizations with real-time insights backed by pre-packaged domain expertise and proven flexibility since 1999. Our cloud-based solutions empower employees and managers to digitize time and labor processes, optimize demand-driven scheduling, simplify absence management and enable strategic business insight. With complete visibility across all employee groups and locations, WorkForce Software equips organizations like Beaufort County School District to reduce labor costs, demonstrate compliance and boost employee engagement, all while maximizing operational efficiencies.

Today, more than 2 million users use our products across more than 1,100 organizations and 60+ countries. Our superior solution set and strong dedication to customer satisfaction have helped us consistently earn a customer retention rate of 97% year over year. With seamless integration and real-time visibility, we can empower Beaufort County School District to digitize complex policies and compliance concerns so you can reduce costs, maximize efficiencies, and improve employee satisfaction.

WorkForce Software finished 2017 with record revenues, posting a 32% increase in ARR bookings from the previous year. The company also experienced significant growth in recurring revenue generated by cloud-based workforce management deployments, marking a 34% increase in 2017 versus 2016.

The WorkForce Suite

The WorkForce Suite is a flexible, cloud-based workforce management solution comprised of the following options:

- **WorkForce Time and Attendance** captures detailed labor data and automates even the most complex pay rules for your diverse workforce — hourly, salaried or contingent.

- **WorkForce Absence Compliance Tracker (ACT)** manages every aspect of employee leaves, including national, state/provincial, union, and corporate policies, in a single tool

- **WorkForce Advanced Scheduler** is a highly flexible solution that allows you to optimize labor schedules so you can field the right team at the right time, every time.

- **WorkForce Analytics** provides real-time access to a complete view of your organization's workforce analytics to improve business analysis and workforce planning

The Solution for Beaufort County School District

Based on the requirements outlined in your RFP, this proposal is specific to **WorkForce Time and Attendance** and, optionally, **WorkForce Absence Compliance Tracker**. Should you wish to explore other facets of the WorkForce Suite, I would be happy to provide you with more information or arrange a demonstration.

We will be partnering with Workforce Insight to bring you all implementation services. Through the WorkForce Software Partner Certification Program, we have trained and equipped an extensive network of partners, such as Workforce Insight, to help with all aspects of implementation. Centered on a combination of in-depth classroom training and hands-on implementation experience, our multilevel certification program equips certified partners with deep product knowledge and a strong foundation in workforce management best practices. Through proven educational methods and rigorous testing, participants have the opportunity to engage in configuration and deployment training from a functional and/or technical perspective. Extensive hands-on experience further prepares participants to contribute significant, measurable value to each project. By choosing WorkForce Software and our implementation partner, Workforce Insight, you can be confident that you are working with a true expert in matching solution design to business goals, helping you to maximize the return on your investment.

Time-Entry Options

Consistent with our commitment to meeting customer needs, we offer multiple web- and hardware-based time-entry options for convenient, cost-effective access. Most popular is the WorkForce Terminal 4050, which offers a 7" capacitive touch screen. We also offer a severe-duty terminal with a 4x NEMA-rated enclosure. Whether you require biometric scanners and/or or magnetic stripe, barcode, or proximity readers, our data collection terminals provide a range of options without locking you in to proprietary hardware. In addition, all of our badge readers are able to maintain transactions in queue during service or network outages, so you never miss a transaction.

WorkForce Time and Attendance also includes a mobile solution that provides a crisp and intuitive display on both Android and iOS devices, with views optimized for both tablet and smartphone screens. Mobile access allows workers to quickly and easily clock in and out anywhere, as well as confirm details about their schedule, timesheet, and time-off requests. Built on the HTML5 standard, WorkForce Mobile Time and Attendance is 100% web-based and does not require the installation or management of dedicated apps or plug-ins. Additionally, our mobile solution is a standard part of a WorkForce Time and Attendance deployment, and delivered at no additional cost.

To learn more about WorkForce Terminals, please refer to **Attachment 2 – WorkForce Data Collection Terminals**.

4.01.4 Offeror profile

The Offeror must provide a profile of its organization and all other companies who will be providing services through a dealer, distributor or subcontractor arrangement with the Offeror. At a minimum, the Offeror will provide the following information:

• Name of firm submitting proposal

WorkForce Software, LLC

• Main office address, telephone number, fax number

Our corporate headquarters is located in Livonia, MI.

WorkForce Software
38705 Seven Mile Road, Suite 300
Livonia, MI 48152-3979

(p) 734.542.4100
Toll-free 877.4WFORCE (877.493.6723)
(f) 734.542.0635

• Primary contact email address and website address

Len Ferraro, National Channel Sales Manager
M: (585) 309-3905
E: lferraro@workforcesoftware.com
https://www.workforcesoftware.com/

• If a corporation, when and where incorporated

WorkForce Software has been incorporated in Delaware since 1999.

• List any dba's

Not applicable

• Number of years in business

~20 years (since 1999)

• Total number of employees

WorkForce Software has approximately 536 employees.

• State acceptance of Procurement Cards as required in Section 7.1.2

Contractor agrees to accept payment by the South Carolina Purchasing Card for no extra charge. The Purchasing Card is issued by Visa. The purchasing card allows BCSD to make authorized purchases from a vendor without the requirement to issue a purchase order.

While we cannot accept credit cards, we do accept ACH, Wires, EFTs, and Checks.

4.0.1.5 Qualifications

A. Qualification Statement

The Offeror will provide a QUALIFICATION STATEMENT which briefly describes what makes it company uniquely qualified to provide a Time Clock System, including any superior qualities its company possesses that would benefit the District.

Since day one, WorkForce Software has focused exclusively on helping organizations like Beaufort County School District (BCSD) address complex workforce management goals, and that singular focus allows our team to deliver strategic, informed, and high-touch services. You can expect:

Proven best practices – Our solutions allow you to take advantage of nearly 20 years of domain expertise and proven best practices. With pre-built templates to address the most common workforce management challenges, as well as integrated compliance with national and local wage-and-hour laws and absence regulations, we deliver deep expertise you can depend on. We also offer post-implementation support and a range of managed services to keep your solution running smoothly for years to come. The combination of our extensive industry-specific knowledge, our consultants' deep functional expertise in time, leave, and scheduling, and the inherent flexibility of our software enables us to help you fundamentally improve your workforce practices – rather than merely automating them.

Unmatched compliance expertise – Maintaining compliance with labor laws, union agreements, and company policies becomes more onerous with each passing year. A slew of local regulations regarding employee work hours, pay, and leave protections have popped-up in industrialized countries around the world, and national laws – such as the U.S. Fair Labor Standards Act (FLSA) – are continually adjusted by legislative amendments as well as judicial rulings. WorkForce Software brings an unmatched level of compliance expertise and support, both in the WorkForce Suite and in the services that surround it, to help organizations like BCSC simplify compliance and mitigate its associated risks.

WorkForce Time and Attendance is uniquely designed to help BCSD achieve these strategic objectives. Its powerful rules engine, proactive alerts, and flexible reports enable your business to achieve greater:

- **Data accuracy –** WorkForce Time and Attendance flags potential timesheet errors based on BCSD's specific configuration, to make it easy for supervisors to catch and correct items before they reach payroll. Employees and supervisors also receive automated reminders to complete tasks such as submitting or approving a timesheet or time off request, to help ensure consistent and prompt data entry.

Perhaps most critically, WorkForce Time and Attendance calculates all pay rules in real time – including union and corporate premiums and overtime regulations included within state and federal laws – to simplify compliance and provide a full picture into labor activities and costs.

- **Data completeness –** WorkForce Time and Attendance's deep configurability allows BCSD to accommodate the complex and distinct requirements of each employee group, without resorting to custom code or manual workarounds. Further, configurability makes it easy to adapt WorkForce Time and Attendance to new requirements or regulations as they change, so that you can continue to cover 100% of your workforce on one system, with minimal costs. This 100% coverage removes the concern about data gaps in your workforce reporting, and grants you access to an enterprise view of time and activity data with a few mouse-clicks – a critical feature when making strategic decisions.

- **Data analysis –** WorkForce Time and Attendance comes 'out of the box' with more than a hundred standard reports to help you recognize patterns, adapt practices, and improve workforce utilization across the business. For greater ad hoc reporting and business insights, WorkForce Analytics can be paired with WorkForce Time and Attendance. WorkForce Analytics makes it easy to correlate your labor data with data from other enterprise systems, so you can get a snapshot of not just your labor costs and activities, but a clear sense of how those activities influence productivity, retention, and other key measures

BCSD will be better equipped to manage its competitive business, provide real-time decision support to its management team, and minimize administrative demands on payroll by taking advantage of these distinct WorkForce Software strengths.

WorkForce Software is partnering with Workforce Insight for implementation services. As the leading workforce management solution implementation specialists, Workforce Insight's WorkForce Software implementation services and project support are unmatched by our competitors. Due to our strong reputation for exceptional quality of service and the unmatched functional and technical knowledge our workforce management professionals bring to every project, satisfied clients continue to be our leading source of referrals—resulting in our firm being chosen time and again as the preferred partner for the clear majority of recent workforce management system implementation engagements.

Our knowledgeable staff, specialized project management framework, proprietary tools, and our commitment to customer satisfaction are just a few assets that Workforce Insight brings to provide a strong foundation for every project we support. Other assets we will employ to guide the BCSD's WorkForce Software implementation and help provide a roadmap for managing change, mitigating risks and maximizing the value of the district's WorkForce Software investment include:

World-Class Customer Satisfaction Rates

- Strong public school district experience, with a deep understanding of needs, challenges, budgetary concerns, and business objectives

- Specialized Time, Attendance, Leave, Scheduling and Payroll experience

- Proven project management approach and implementation methodology based on best practices and well-known process improvement methods

- Recognized third-party, trusted advisor respected for organizational culture dedicated to client success

- 300+ clients, including several world-class organizations and 48 of the Fortune 500

- Experience leading hundreds of successful workforce management system integrations, implementations and upgrades, including several end-to-end WorkForce Software implementations and upgrades

- Deep bench of 140+ workforce management resources who are subject matter experts with an average of 9 years of workforce management experience

Workforce Insight's greatest strength and our primary measure of project success is our ability to meet or exceed expectations while helping our clients achieve their workforce management goals and vision for an improved future state. The Workforce Insight team conducts client satisfaction evaluations throughout the course of every project we lead. During the last phase of the engagement, we conduct a final client satisfaction survey to record overall satisfaction with the Workforce Insight team. Key areas in which Workforce Insight performed well are documented, as are the top areas in which we can improve.

Workforce Insight uses the Net Promoter methodology to measure customer satisfaction, and consistently receives client feedback scores that rank among companies well-known for exemplary customer service. Given the NPS range of -100 to +100, based on Global NPS Standards, a "positive" score or NPS above 0 is considered "good", +50 is "Excellent," and above 70 is considered "World Class." Workforce Insight's current NPS score is 78.3.

Unmatched WorkForce Software Experience

As a WorkForce Software partner, Workforce Insight enjoys the solid, time-tested working relationship between our two companies. We have successfully completed many WorkForce Software implementations, often in collaboration with WorkForce Software.

We serve our clients with project teams that include WorkForce Software experts and SMEs with comprehensive knowledge and unmatched experience with WorkForce Software solutions, and help our clients realize a clear path toward an optimal state through the alignment of process and WorkForce Software technology.

For more than a decade, Workforce Insight has been consistently recognized as a trusted advisor and WorkForce Software implementation specialist. Some of the strengths we bring in relation to our longstanding WorkForce Software partnership and unmatched WorkForce Software expertise are highlighted below.

- 10+ years of success as WorkForce Software implementation & optimization partner

- Successful completion of numerous WorkForce Software implementations for large and well-known organizations—often in collaboration with WorkForce Software

- A team of WorkForce Software experts who bring an average of 9 years of workforce management experience

- Full range of WorkForce Software implementation services and support, including tailored WorkForce Software system training and change management services

- Implementation specialists trained directly by the manufacturers of WorkForce Software products

- Consulting resources on the team to serve the district include WorkForce Software experts and SMEs with comprehensive knowledge and unmatched experience with WorkForce Software solutions

More information about our Workforce Software experience can be found at https://www.workforceinsight.com/workforce-software-services.

B. Organization and Staff Experience

The Offeror will describe its qualifications and experience to perform the work described in this RFP. Information about experience should include direct experience for performing a Time Clock System within the past 24 months, and the size of those public entities served.

Please see the response above. In addition, in the past 24 months, 20+ public sector customers have selected the WorkForce Suite. Customers using the WorkForce Suite have, on average, 10,000 employees using the solution, and our largest customer has more than 150,000 employees.

In the 12 years since Workforce Insight was founded, we have successfully completed more workforce management system implementations, upgrades, and supplemental workforce management consulting engagements than any other firm, including many full-scale WorkForce Software system implementations. One very recent project that closely mirrors that of the BCSD is our work with another large public school district. For this project, Workforce Insight was engaged to standardize workforce management processes and provide comprehensive WorkForce Software implementation services that resulted in the streamlined automation of time and attendance, leave management, and shift documentation across the district.

Work performed by Workforce Insight at the school district as part of this project included:

- **Time & Attendance and Absence Compliance Solution Implementation**

    o Close, cooperative effort with the client team to define, document, and approve discrete requirements

    o Highly-coordinated review of existing policies and practices to determine scheduling, pay rules, work rules, policies, integration and technical architecture requirements

    o Interface work allowing communication between interdependent systems

    o Thorough system testing and testing assistance, district-wide rollout, and end-to-end support

- **Training Services**

    o Tailored system training and training support materials development and delivery

- **Change Management Services**

    o Change management and communication strategy development and execution

    o The school district and Workforce Insight continue to enjoy a strong and positive ongoing business relationship due to the solid partnership formed throughout this project, which was a major factor contributing to this initiative's success.

C. Statement of Work Questionnaire

Please see our responses starting on the next page.

TIME CLOCK SYSTEM

RESPONSE FORM

4.1 Vendor Information

A. <u>References for installed Systems: (use additional space as needed)</u>

WorkForce Software has strong and mutually successful relationships with our customers, as evidenced by our 97% customer retention rate. We are also careful about making requests of our customers' time. For this reason, customer references are shared with discretion. Once you have reached your final due diligence stage, we will put your organization in contact with customers who have similar business requirements, systems, and goals, so you can discuss their experience with our organization and the WorkForce Suite. In the meantime, please visit our customer success page to learn more: http://www.workforcesoftware.com/customers/.

In addition, our implementation subcontractor, Workforce Insight, has provided details about recent projects in the **5.1 5.1. Qualifications – Required Information** section starting on page 67. In addition, please see the details for several recent projects they have implemented starting on the next page.

Large K-12 School District Implements Uniform, Organization-Wide WFM System to Streamline Time & Attendance and Optimize Current State

▶ CHALLENGE

This large, urban school district's 17,500 teachers, substitute teachers, classroom aides, and other school and administrative employees were using multiple different time and attendance systems, and operating under varying workforce management processes and practices across more than 200 schools and locations. To streamline time and attendance and improve the overly complex, inefficient current state, this client was seeking a trusted workforce management advisor with the right expertise to guide the organization throughout its endeavor to standardize processes and implement a uniform system across the district.

In addition to having complex requirements and involving a unionized workforce, the system required interface work to effectively communicate with other existing systems that helped coordinate employees across the district on a daily basis, and the overall project needed to be conducted within a tightly-controlled budget.

▶ SOLUTION

Workforce Insight was selected to assist the district in its workforce management endeavor to standardize processes and provide comprehensive WFM system implementation services that resulted in the automation of time and attendance, leave management and shift documentation across the organization. Services provided include:

Time & Attendance and Absence Compliance Solution Implementation
- Close, cooperative effort with the client team to define, document, and approve discrete requirements
- Highly-coordinated review of existing policies and practices to determine scheduling, pay rules, work rules, policies, integration and technical architecture requirements
- Interface work allowing communication between interdependent systems
- Thorough system testing and testing assistance; district-wide rollout, and end-to-end support

Training Services
- Tailored system training and training support materials development and delivery

Change Management Services
- Change management and communication strategy development and execution

The district and Workforce Insight enjoy a strong and positive ongoing business relationship due to the solid partnership formed throughout this project, which was a major factor contributing to this initiative's success.

CLIENT PROFILE

Large Public School District

👥 Employees: 16,000

"The Workforce Insight team is very knowledgeable, honest, and efficient, and great to work with collaboratively."

— Payroll Director

"Workforce Insight brought the right experience at the right time for us. Their approach and open collaboration have made this the best project experience we've ever been a part of."

Chief Financial Officer

WFM System Implementation
School, Research Institute and Fine Arts Museum

▶ CHALLENGE

This School, Research Institute and Fine Arts Museum educates the public by collecting, preserving, and interpreting works of art of the highest quality, representing the world's diverse artistic traditions. The institute has a conservation science department, five conservation laboratories, and one of the largest art history and architecture libraries in the country. The school has a large number of students who are employed in a wide variety of locations throughout the campus, and monitors the hours and dollar cost of the student employees for each location where they perform services.

CLIENT PROFILE

School, Research Institute & Fine Arts Museum

▶ SOLUTION

In addition to implementing the WFM system across campus locations, Workforce Insight was engaged to adapt the system configuration to provide the ability for student employees to enter the location where they are working when punching in/out of their timesheet on the web clock.

Workforce Insight has been subsequently engaged to assist with accommodating sick time policy updates to new policies passed by the city, requiring updates to pay codes, sick bank, exceptions, display updates/configuration, payroll export, eligibility reports, etc.

Locations: 14

Employees: 2,200

Engagement(s) – Project Highlights:

- Workforce Management Assessment
- Business Case Development
- Vendor Selection
- Requirements Gathering
- Comprehensive WFM system Implementation
- WFM System Training
- City Sick Time Policy & Configuration/Updates

WFM SOFTWARE OPTIMIZATION – LABOR COST TRACKING

In addition to delivering a streamlined and highly successful implementation, Workforce Insight was selected to enable new functionality and configuration adaptations to support employee location-based roles/costing as well as city-mandated sick time policies.

WORKFORCE INSIGHT

Utility Company Implements WorkForce Software for Streamlined Compliance & Improved Manager-Employee Connectivity

▶ CHALLENGE

This regional utility company was operating under an antiquated legacy system and cumbersome, error-prone, paper-based manual timekeeping processes. Combined with policies and practices that varied widely across the organization, the current state was making compliance a complex task.

The company sought a trusted advisor to help guide the implementation of a uniform WorkForce Software solution to integrate time capture, manage paid time off, and document shifts, as well as to help standardize and streamline processes and policies to ensure consistent application across the organization.

▶ SOLUTION

Following a competitive RFP process, Workforce Insight was selected to help the company standardize processes and provide comprehensive WorkForce Software implementation services that resulted in the automation of time and attendance, leave management and shift documentation across the organization. Services provided include:

Time & Attendance System Implementation
Detailed requirements gathering, automated testing, rollout, and deployment support

Absence Compliance Tracking Implementation
Simplified leave management and tools to help keep abreast of state and federal regulations

Advanced Scheduling Implementation
Enabling employees to indicate availability and changes more efficiently

Fatigue Management Implementation
Simplified compliance with industry regulations and best practices to automate enforcement of work hour restrictions that facilitate employee safety

Training & Knowledge Transfer
Customized training and training support materials development and delivery

Change Management Services
Comprehensive change management and organization-wide communication strategy development and execution, essential to achieving optimal adoption

Workforce Insight's close collaboration with the client and an all-encompassing approach to managing the change brought about by new systems and processes laid the groundwork for a smooth project and the ongoing partnership that exists with the client today. Workforce Insight continues to provide ongoing support for this initiative, helping the client successfully achieve long-term workforce management goals.

CLIENT PROFILE

Large Natural Gas Provider

👥 Employees: 2,200

"The whole Workforce Insight team is knowledgeable, easily accessible and considerate of client needs. Open communication, along with Workforce Insight's methodology and approach, have kept our project on track and running smoothly."

— Client-side PM

Standardized Pay Practices and WFM Solution:

- Empower employees to access their schedules anytime, anywhere

- Help reduce errors associated with manual timekeeping

- Facilitate compliance with federal and state labor laws and regulations

- Enhance communication between managers and employees regarding scheduling needs

WORKFORCE INSIGHT

workforceinsight.com

Large Auto Manufacturer Successfully Implements Enterprise-Wide WFM System

Time & attendance system rolls out across unionized workforce with complex pay rules and practices across affiliate companies

▶ CHALLENGE

With more than 14 entities and affiliates at more than 1,600 locations, this well-known auto manufacturer was in need of a uniform time and attendance solution that took into account a diverse employee mix, challenging pay rules across 5 different unions, and disparate pay practices across affiliate companies. While the need for a new solution was undeniable, end-user adoption was a significant worry, as a previously unsuccessful system rollout had left affiliates at odds and employees wary of change.

▶ SOLUTION

Workforce Insight was engaged to fully implement the company's selected time and attendance solution, as well as provide program management for the integration of the company's payroll system rollout along with the time and attendance and HR systems as part of a major payroll solution upgrade.

The turn-key team of Workforce Insight workforce management specialists, hand-selected to bring the industry, technical and functional expertise specific to the needs of this implementation project, included:

- Seasoned project management resources with more than 10 years of experience leading complex implementations, seamlessly coordinating scope among vendors and platforms for each project

- 11 testing leads, test script developers, and execution resources who carried out end-to-end, in-depth testing required to ensure the system aligned with complex pay-related requirements (including testing strategy and test script development, test script execution, and defect tracking/resolution)

- A dedicated team of highly-experienced training specialists and Prosci®-certified change management professionals with a long history of success leading training and change management for major workforce management initiatives at large organizations

Following a 4-month stabilization period, Workforce Insight was engaged to begin the expansion of the implementation at a newly-formed entity, handling all payroll functions for the enterprise. Workforce Insight continues to provide Post Implementation Help Desk Support for existing users and will continue to roll out the new system to across the company's U.S. locations.

CLIENT PROFILE

Large Auto Manufacturing Company

Locations: 1,600

Employees: 9,700

HIGH END USER ADOPTION & SATISFACTION

The Workforce Insight team successfully delivered throughout an aggressive 52-week timeline, bringing high-priority entities live on the fully-functional system, with high end-user satisfaction and a 93% user adoption rate on Day 1.

"The change management on this project was one of the best I have seen! We made a change to the entire organization with very little noise from our associates. That is the best compliment you could ask for!"

- Client Project Sponsor

WORKFORCE INSIGHT

workforceinsight.com

National Commercial Bank Successfully Turns Around Failed WFM Implementation

New system accommodates complex requirements and wide variances in status, pay, benefits, and schedules

▶ CHALLENGE

A failed implementation attempt and a series of acquisitions left a large national bank with multiple disparate workforce management systems in place, most of which could not work together and did not easily allow for adjustments as the client's workforce began to evolve. With each acquisition, the clearer the need became for a uniform time and attendance solution that not only provided an improved user experience, but that could also accommodate complex requirements related to a large workforce with wide variances in status, pay, benefits, and schedules.

▶ SOLUTION

Workforce Insight was engaged to bring the failed system deployment back on track, breathing new life into the project by providing fresh perspective and a full team of resources with turn-key implementation expertise aligned with the needs of this complex implementation project.

Workforce Insight also delivered best practice recommendations for payroll practices, optimized scheduling and identified other HR efficiency improvements, as well as a more streamlined time tracking accrual and attendance process. The completion of this initiative resulted in a dramatic decrease in overtime and significant reduction in the client's overall labor costs.

Project Highlights Include:

- Workforce Management Advisory Services
- Requirements Gathering/Definition
- Full-Service Time & Attendance System Implementation, including: Design, Configuration, User Acceptance Testing/Support
- Training - Development and deployment of end user training on the new system
- Change Management - Development/execution of change management and communication strategy to ensure system adoption by a user population highly resistant to change after a failed initial implementation
- Post Implementation Support/Managed Services (Subscription Model) - Managed Services/Support for ongoing system support and maintenance, allowing uninterrupted, just-in-time access to system expertise and knowledge base, augmenting client resources

CLIENT PROFILE

National Commercial Bank

Locations: 400

Employees: 12,000

BEST PRACTICE IMPLEMENTATION

Drove overtime & labor cost reductions

The Workforce Insight team worked side-by-side in collaboration with the client project team and stakeholders to achieve this successful project turnaround, bringing substantial reduction in overtime and significant decrease in the company's overall labor spend.

WORKFORCE INSIGHT

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4.2   Statement of Work Questionnaire:

3.1.4 DATA COLLECTION

	Requirement	Y	N
1	Data collection terminals should support bar code, magnetic stripe, I proximity readers, and biometric capabilities such as finger scan technology. **WorkForce Software Response:** WorkForce Time and Attendance (WT&A) supports several data collection methods, including online timesheets, WebClock (online time clock), badge readers, biometric readers, slot readers, scanners, smartphone and tablets, and touch tone telephony/IVR. Terminals support magnetic stripe, bar code, and proximity readers and provide reliable data collection with options such as battery backup and store-and-forward options. The way in which employees interact with the clocks is configurable based on your requirements. Options include allowing employees to use clocks for labor transfers, viewing accrual balances and schedules, and requesting time off. Our clocks have a configurable menu structure for employees to interact with the device in a meaningful way, ensuring minimal training is required.	Y	
2	Data collection terminals should support on-line and offline modes. **WorkForce Software Response:** Time entered directly on the timesheets through the browser application is updated in real time. Clocks are configured as addressable network nodes and clock transactions are written to and validated by the WorkForce Time and Attendance application as the punches occur. No polling process is required in this configuration. WorkForce Software terminals allow for punches to be stored locally if the network is unavailable or a connection to the Time and Attendance server is unavailable. Once connectivity is restored, the terminal transmits any pending punches back to WorkForce Time and Attendance. The 4000 and 5000 series terminals will each store over 100,000 transactions during an outage. In the event of a power outage, the available battery backup on a terminal may be used to accept transactions for around 90 minutes, based on the available battery backup. For longer power outage requirements, WorkForce Software recommends utilizing a redundant backup on the power source.	Y	

	Punches collected while the terminal is on are stored locally on the terminal until power and connectivity are restored. Employees may use the terminal normally even when the network or system server is inoperative. Some options such as viewing bank balances, schedules or requesting time off may have limited functionality when the system server is unavailable. While accrual balances and schedules are available during a server outage, they are only as current as the last time the clock communicated to the server.		
3	In online mode, transactions should be transmitted from the data co-terminal to the database in real time. **WorkForce Software Response:** WT&A is a real-time, web based application. Punches are immediately transmitted to the database.	Y	
4	Data should be stored at the data collection terminal until confirmation of successful transfer is received to prevent data loss. Transactions should be available for exception reporting, on premise reporting and pay rule calculation in real time. **WorkForce Software Response:** WT&A is a real-time, web based application. Punches are immediately sent to the database. If the terminal is offline, it will store punches until connectivity is re-established. Transactions are not removed from the clock until they have been processed successfully by WorkForce Time and Attendance. Solution rules are applied and validated in real time, providing on-demand access to timesheet information. All attendance information such as punch transactions are updated in real time and available for exception reporting, on premise reporting, and pay rule calculations.	Y	
5	Data at the data collection terminal should be secure and stored in non-volatile memory in off-line mode to prevent data loss in case of power failure. **WorkForce Software Response:** Transactions are not removed from the clock until they have been processed successfully by WorkForce Time and Attendance. In the event of a loss of connectivity, punch transactions are stored locally at the terminal until connectivity is re-established. During power outages, battery backups allow for at least 90 minutes of additional power.	Y	

	If the network connection to WT&A is unavailable, the WorkForce 4050 and 5000 series terminals can store over 100,000 offline transactions. The 1000 series terminal can store over 10,000 transactions offline.		
6	The solution should accommodate recorded entry rounding to the nearest tenth hour, quarter hour, or actual time for start and stop as well as meals and breaks. **WorkForce Software Response:** In/out polices define, among other things, whether to round in/out or elapsed times, or not round at all. Rounding requires the choice of a clock interval for rounding. Rounding time can be to any increment including the nearest 5, 6, 10, 12, 15, 30, or 60 minutes. In addition, actual in/out and elapsed times are stored in the database. If rounding is not required, the solution calculates time to the minute. Grace periods - along with special rules for handling early or late punches within those grace periods - can be defined around the scheduled start and end times of the shift and of any lunch or meal break.	Y	
7	The solution should provide for the prevention of overlapping or redundant recorded entry of beginning and end time entries. **WorkForce Software Response:** The application automatically checks for overlapping punches and issues an error message on individual timesheets, group time screens, reports, and, optionally, by email. We can configure overlapping punches to be ignored or included in calculations and pay. There is also specific logic for detecting duplicate transactions.	Y	
8	The solution should restrict recorded entry (punching) at the data collection terminal or web-based entry screen during unauthorized times, including early, late, early out, late out, and unscheduled days. **WorkForce Software Response:** WT&A will automatically compare clock times with the employee schedule to identify attendance issues (late arrival, early departure, etc.). Multiple options are available to restrict employee punching. Employees can be prohibited from punching ahead of scheduled shift start times. However, it is recommended to allow a punch to acknowledge the employee's presence, but not to pay for the additional time unless approved by the manager. Other options include automatically adjusting early punches to the scheduled start time for the purpose of time and pay calculations or manual edits by the manager.	Y	

9	The solution should allow for employees to record entries at multiple locations in the district. **WorkForce Software Response:** We can configure the application to accept time entries from multiple locations and/or data collection devices per employee. In addition, through configuration, employees can be restricted to specific clocks. In addition, employees can be restricted to a subset of labor accounts.	Y
10	The solution should provide for supervisor override of punch restrictions 10 at the data collection terminal and online. **WorkForce Software Response:** Managers can use the Group Time Entry screens in the application to perform global or individual overrides. In addition, supervisor override functionality is supported at the terminals, allowing supervisors to override certain employee transactions, as required.	Y
11	System should support the assignment of employees to particular data collection terminals, and restrict their ability to enter transactions at other terminals (e.g. in a building other than their assigned building). This restriction should be assigned by employee or employee group. **WorkForce Software Response:** Through configuration, employees can be restricted to specific clocks.	Y
12	Employee transfers to different accounts, departments, jobs, or work rules should be validated for that employee at the point of entry. **WorkForce Software Response:** Employees can move easily between jobs or departments with no managerial action. Our solution provides powerful labor distribution capabilities that allow you to set up virtually unlimited number of fields for charging time to departments, projects, tasks, etc. The function supports hierarchical relationships between fields and permits the enforcement of defaults and restrictions. Employees can be prompted to enter appropriate labor distribution selections at the time clock, on mobile devices, or directly on the timesheet.	Y

13	Employee self-service transactions, such as approving timecard, time off request, review schedule, review recorded entries, and review accrual -balances should be available online.	Y	

WorkForce Software Response:

WorkForce Time and Attendance offers a diverse range of self-service features, including:

Employee self-service

- Timesheet interactions, such as punching in to or out from a shift, switching to a different project, or punching out for a break

- Preview pay

- Timesheet attestation

- View work schedules and set availability

- Swap shifts

- Respond to call out requests (text, phone, or email)

- Enter bid(s) for vacation and job/shift bids

- Request time off

- View accrual banks and the status of time off requests

- System generated alerts and messages

14	Employee requests for time off at the data collection terminal should be validated against their real-time balances at the point of entry.	Y	

WorkForce Software Response:

WorkForce Time and Attendance is a real-time, web based application. Solution rules are applied and validated in real time, providing on-demand access to timesheet information. Accruals and bank depletions are automatically calculated based on your business rules. All attendance information is updated in real time and available at any browser.

If there is an issue with a transaction, WorkForce Time and Attendance can immediately notify the user of the problem. For example, when an employee requests time off, before they even submit the request, WorkForce Time and Attendance notifies employees if they do not have enough time available.

In addition, WorkForce Time and Attendance will look into the future to identify potential issues. For example, an employee requests time off a month in the future and the employee's manager approves that request. After the approval, the employee makes another time off request.

	WorkForce Time and Attendance will identify the impact on the first time off request and inform the employee if there is a problem. Or, the solution can prevent the employee from submitting the new request.		
15	To accommodate heavy use periods, employee self-service transactions can be restricted by terminal, terminal group, or time of day for any terminal. **WorkForce Software Response:** Data collection devices can be configured to allow specific functions by device. For example, a terminal in a high traffic area where there are many employees punching during a shift change may be configured to allow only punching IN or OUT. A terminal in a lower traffic area, such as a break room, may be configured to allow all self-service features.	Y	
16	Data collection terminals should be configurable to provide only services and functions that may be unique to the workforce at the terminal location. **WorkForce Software Response:** The solution fully supports this requirement. Through configuration, each terminal can be set up to provide only the services and functions desired. For more details, please see the previous response above.	Y	
17	Employee self-service capabilities should be available on a PC, kiosk, cellular device, tablet application or through standard web browsers. **WorkForce Software Response:** Employee self-service is available on a PC, kiosk, cellular device, tablet, or standard web browser.	Y	
18	The solution should provide support for a system administrator to control functional access by employees. Employees should only be presented with those functions to which they have access, according to their role and needs. **WorkForce Software Response:** The solution provides complete security, including the ability to specify all aspects of access, including what features, records, reports, table, and fields users or groups of users may access. Our solution is role-based and utilizes a secure ID/password scheme to protect information from unauthorized access. Different roles (e.g. employee, manager, timekeeper, payroll administrator, etc.) can be defined along with the specific features, fields, and codes each role may access. The levels of access are completely configurable. Our product comes with many pre-configured roles, including: Administrator, Manager, and Employee. You can define as many levels of access as you like and assign a different set of rights to each. The ability to add user levels and rights is a secured function.	Y	

	The system administrator is usually authorized to set up and maintain security in the solution. Users in the application have specific rights granted to them. The rights are stored in an application table. Most configurations involve some rights that are automatically created and assigned to the user via the import of data from your HR system. For instance, a manager will have rights to perform time entry and approvals only for the employees for whom she is responsible. The configured rights control exactly what records and fields a logged in user may access. For example, pay rate information can be restricted to the Payroll Department, preventing managers or other users from viewing it.		
19	The solution should provide the ability to view immediately the outcome of the rules processing on the time entry web based time card. **WorkForce Software Response:** WT&A is a real-time, web based application. Solution rules are applied and validated in real time, providing on-demand access to timesheet information. All attendance information is updated in real time and available at any browser.	Y	
20	The system should provide for real time alerts to timekeeping exceptions, such as approaching overtime. **WorkForce Software Response:** Exceptions are generated immediately in real time. They are generated through the configuration and use of policies that automatically apply your business rules in real time. Your business rules are the basis for defining exception conditions and messages. We can configure an exception policy, viewable by the manager if desired, that flags worked overtime hours over a defined threshold. We offer the option to allow managers to be able to approve configured conditions like approaching overtime and can also notify the manager of approaching overtime via email.	Y	

Describe completely how your solution addresses, and satisfies each of the Requirements in Section 3.1.4

3.1.5 Pay Policy Enforcement and Time Evaluation

	Requirements	Y	N
1	Pay rules should be completely parameter driven and easy to set-up, change, and track without recourse to special programming or other technical skills. **WorkForce Software Response:** WorkForce Time and Attendance automates complex business rules through a graphical interface known as the Policy Editor. The configuration always begins with a policy profile that defines the employee type (exempt vs. non/exempt, pay period interval, etc.). Once the general policy profiles are defined, individual business rules are configured and assigned to the policy profile. Configuration is performed by answering predefined questions within a particular rule. Depending on the type of question, the user will be given the opportunity to answer questions via check boxes, pick lists, or defining qualifications or calculations using our Excel-like formula language. The formula language can utilize any information available to the solution to qualify an employee's eligibility for a rule including employee record information, schedules, and historical timesheet data. We can train authorized BCSD staff on the policy editor, enabling you to perform the configuration. Almost every aspect of the solution can be changed through policy configuration, including screen layouts. These changes are all done through the application's policy editor and do not require any custom code.	Y	
2	The system should provide for the configuration of an unlimited number of pay rules. **WorkForce Software Response:** WorkForce Time and Attendance supports unlimited pay codes and attendance rules for all employee groups. The Policy Editor allows our customers' business administration resources to make changes and easily add new pay policies. The availability of these codes and the rules governing them are effective-dated. The Policy Editor is a unique differentiator with WorkForce Software's solution set.	Y	
3	The solution should provide the ability to update user-defined rules and have the changes reflected immediately for time entry and processing. **WorkForce Software Response:** WorkForce Time and Attendance provides real-time automation of overtime, attendance, leave policies, union rules and many other configurable rules. Most rules are configured as policies that include multiple, effective-dated versions to support correct recalculation of historical timesheets and pre-configuration of pending rules for future timesheets.	Y	

	This means you can perform rules maintenance to take effect on a specified date, providing real-time rule management. The solution allows for the definition of an unlimited number of business rules that can be tracked and reported on. We can configure sets of policies uniquely designed for each employee group. This includes different rules for varying employees and employee groups regarding overtime, rounding, holidays, schedules, shifts, accruals, etc. Rules and other configurations are assigned to Master Policies, which in turn are assigned to employees. The Master Policies are mapped using a Policy Mapping tool, which you can configure with the combinations of HR fields that map employees to specific policies.		
4	The solution should provide the ability to define pay rules at the employee, or group level. **WorkForce Software Response:** The solution allows for the definition of an unlimited number of business rules that can be tracked and reported on. We can define an unlimited number of employee categories for which we can configure sets of policies uniquely designed for each employee category. The policies will control everything from pay rules to timesheet layouts.	Y	
5	The solution should provide the ability to apply rules online at the point of entry, such as activity transfers, job transfers and other changes of status that would result in a different rate or type of pay. **WorkForce Software Response:** WT&A allows managers and employees to transfer employees' job codes at the terminal during a shift, depending on the terminal selected. Multiple job codes can be used each shift and made available for editing by a user with the appropriate security rights. Users can be restricted to only the job codes they are allowed to use and job code may also drive different pay rates or bonuses.	Y	
6	The solution should provide the ability to automatically calculate overtime and other premiums based on the employees' scheduled hours and criteria that is established within the system (e.g. rules based). **WorkForce Software Response:** WT&A's flexible configuration abilities, combined with our powerful formula language, provide the mechanism to set up all of your business rules and calculations. This includes the ability to configure the solution to calculate overtime and pay premiums on the pay codes specified by you.	Y	

7	The solution should provide the ability to automatically calculate overtime and other premiums based on the employees' actual hours and criteria established within the system (e.g. rules based).	Y	

WorkForce Software Response:

The solution's flexible configuration abilities, combined with our powerful formula language, provide the mechanism to set up all of your business rules and calculations. This includes the ability to configure the solution to calculate overtime and pay premiums on the pay codes specified by you. Overtime calculations can consider any contributing factors desired, including start and stop times and scheduled hours.

Overtime can be applied for working over a number of hours in a week, a day, for working more than a defined number of consecutive days, or for working on a day off, specific day of the week, or a holiday. Multiple overtime rules are supported and can be created in any combination. Overtime can be paid at any rate (1.0x, 1.5x, 2.0x etc.). Other options include applying premiums by shift, type of work, department, activity, skill, and many more options exist.

Overtime approval can be conducted online or remotely. Overtime approval can be supported with a number of options including:

- Route a message when overtime occurs and require the manager (or other role) to acknowledge it. This approval can be used to trigger pay or it can just be retained for an audit.

- Allow for preapproval of overtime by updating the schedule or by adding an "overtime request" code or "preapproved overtime" code to the timesheet. This can be entered by the employee, manager, or someone else and can require acknowledgement or approval.

- Callouts for overtime can be processed using WorkForce Advanced Scheduler, which includes a callout tool. One Touch Callout allows you to find a replacement employee or fill an extra shift. The tool will automatically generate a call list and contact those employees in seniority order or by using an overtime equalization process. Employees are automatically contacted using their preferred contact method (phone, text, and/or email).

- Employees have the ability to initiate a swap with another employee through WorkForce Advanced Scheduler. All shift swaps are subject to configurable swap rules and constraints. Agreed-upon requests can be configured to require manager approval, or to simply notify the manager of the exchange, depending on your preferred business processes.

8	The solution should provide the ability to automatically calculate premiums based on a comparison of the employee's scheduled hours vs. the actual hours worked, and criteria established within the system (e.g. rules based). **WorkForce Software Response:** Automatic pay rules can be set up to calculate premiums based on employees' scheduled hours, actual hours and any other user-defined criteria.	Y
9	The solution should provide the ability to calculate Shift Differential automatically based on the time of day an employee works. **WorkForce Software Response:** Shift differentials can be calculated automatically based on your rules, including time of day an employee works. For these and other rules, users are only required to provide the facts; the solution automatically applies the rules without requiring any additional user intervention or entry.	Y
10	The solution should support configurable pay periods for weekly, bi-weekly, semi-monthly and monthly periods. Multiple pay periods for different employee classes should be seamlessly supported in a single database. **WorkForce Software Response:** WT&A fully supports standard time periods, including weekly, biweekly, semimonthly, and monthly. In addition, we support any starting day for the payroll period. A supervisor can also manage employees in multiple periods.	Y
11	The solution should include configurable periods by shift for meal and breaks in accordance with state and federal law whether paid or non-paid. **WorkForce Software Response:** The application automates pay and break rules based on your rules combined with federal, state, and local laws. There is no limit to the number and type of rules that can be configured in the system. For example, this is very common in both union environments as well as some states such as California. WT&A can use any field on the employee record to apply rules such as state for meal-time penalties. In addition, WT&A can help prevent future occurrences by notifying employees and supervisors of occurrences and the State law if desired.	Y

12	The solution should manage holiday pay policies, including holiday pay and apply special rules for hours worked on a holiday. Eligibility rules for holiday pay (work scheduled day before and after, for example) should be automatically enforced.	Y	
	WorkForce Software Response:		
	You can set up as many holiday schedules as required. This is useful in organizations that, for example, have multiple bargaining units, each with its own set of holidays and holiday rules. We support:		
	• Automatically generated holidays		
	• Multiple holiday calendars		
	• Qualification conditions to receive holiday pay, such as working the scheduled day before/after		
	• Pay flat amounts or an average hours amount		
13	The solution should provide the ability to enter both hours and amounts for pay codes.	Y	
	WorkForce Software Response:		
	WT&A timesheets can be used to record start stop times, number of hours, dollar amounts, production quantities, mileage, or any other numeric amounts. Separate codes can be set up and associated with any such unit of measure. Amounts along with time can be included in automatic calculations, for example, productivity-based incentive pay.		
14	The system should provide the ability to perform multiple overtime calculations based on rules built into the system. Overtime calculations will take into account start and stop times, scheduled hours, type of duty performed.	Y	
	WorkForce Software Response:		
	Overtime calculations can consider any contributing factors desired, including start and stop times and scheduled hours. Other options include shift, type of work, department, activity, skill, and many more options exist.		
15	The system should provide for retroactive pay period adjustments. Those retroactive adjustments can be paid in current pay period or special check run.	Y	
	WorkForce Software Response:		
	Retroactive processing is an area that WorkForce Software has a strong advantage over other vendors. Authorized users can amend any prior period within a configured timeframe. The amended timesheet is completely separate from the original timesheet. WT&A keeps both timesheet versions for auditing and reporting.		

	Amended timesheets are reprocessed with the same set of rules that were effective for the pay period of the original timesheet. Once approved, the application automatically generates adjustments to determine the net difference between the original and the amended timesheets. The net difference is automatically passed to payroll and impacts the next check. If an employee needs the adjustment to be paid immediately, the manager can request an off-cycle timesheet. Off-cycle timesheets are not tied to pay periods and can be issued at any time.

Accrual balances and other impacted accumulators will also automatically update with amended timesheets. Authorized users can amend timesheets as many times as necessary to properly calculate an employee's pay. Automatic retroactive processing is also available for events like a retroactive pay increase for a group of employees. | | |
| 16 | The system should allow manager edits, adds, and deletes of any previous pay period data until a predetermined cut-off time.

WorkForce Software Response:

Authorized users can modify time entries in prior (already paid) periods, within a configured time frame.

Such timesheets will be processed according to the rules that were in effect during that prior period, and the application will automatically generate any needed pay adjustments and will automatically adjust any accrual bank balances as needed. Pay adjustments can be included (and distinctly marked) along with current period pay. | Y | |
| 17 | The system should provide the ability to adjust or correct time entries paid in previous pay periods.

WorkForce Software Response:

The ability to edit prior (already paid) period data is configurable and can be set differently for each role, along with how far back in time periods can be edited. Please see our response to #15 above for more details about retroactive adjustments. | Y | |
| 18 | The system should support different pay rules for each job or department.

WorkForce Software Response:

Pay rules are configured using parameter driven policies that can include formulas where needed to maximize flexibility. WorkForce Time and Attendance rules can be defined and applied to employees based on any business rules, including employee job, department, groups, location, or employment status. | Y | |

		Y	
19	The system should allow for the configuration of an employee's probationary period and different leave availability based on probationary status. **WorkForce Software Response:** The application supports probation periods, which are defined by you. An unlimited number of probation periods can be configured to support multiple employee groups.	Y	

Describe completely how your solution addresses, and satisfies each of the requirements in Section 3.1.5

3.1.6 Family Medical Leave Act

	Requirement	Y	N
1	The system must be able to determine an employee's FMLA eligibility. **WorkForce Software Response:** The optional WorkForce Absence Compliance Tracker (ACT) can track and enforce the 1250 worked hours and one year of service required for FMLA eligibility. The solution automatically calculates available FMLA time using any of the federally approved year definitions (calendar year, fixed year, or rolling year or year starting on first use) or variations according to your business policies. FMLA time used can be tracked concurrently with usage of other types of leave such as paid sick or vacation time. ACT also provides decision-based eligibility criteria to help leave administrators determine whether an employee's leave request is an FMLA-qualifying event. Once FMLA eligibility is determined, the solution's case management features ensure required documentation is auto-filled and routed to the employee and that all parties follow the proper workflow for the employee to return to work.	Y	
2	The system must track FMLA used and FMLA available. **WorkForce Software Response:** The optional WorkForce Absence Compliance Tracker (ACT) can track historical, current, and future projected leave usage and available leave time	Y	
3	The system must be able to coordinate time off for FMLA with other types of time off so that employees can receive paid leave if needed for eligible FMLA events, or not receive paid leave as determined by employer-defined parameters. **WorkForce Software Response:** FMLA can be used concurrently with any other type of leave, including vacation, sick, state mandated leave, company medical leave, short-term disability, long-	Y	

		Y	
4	term disability, etc. Concurrent use can be set up as optional/discretionary or automatic/mandated according to your rules.		
	The system should send notification to the employee about FMLA requirements. **WorkForce Software Response:** The optional WorkForce Absence Compliance Tracker (ACT) can notify managers and employees. Notifications include emails and/or reports. In addition, users can access details directly in the solution via summary screens.	Y	
5	The system must support all of the definitions of yearly calculations allowed by the Department of Labor. **WorkForce Software Response:** The optional WorkForce Absence Compliance Tracker (ACT) can track historical, current and future projected leave usage and available leave time, measured in days, weeks, hours or a unit of your choice. For example, FMLA is measured in weeks, and available FMLA time is automatically calculated based upon your choice of the four federally approved year definitions (calendar year, fixed year, or rolling year or year starting on first use).	Y	

Describe completely how your solution addresses, and satisfies each of the requirements in Section 3.1.6

3.1.7 Approvals

	Requirement	Y	N
1	The system should provide the ability for employees to approve their timesheets. This approval should be available within employee self-service and the data collection terminals. **WorkForce Software Response:** Employees perform time entry each period, modifying as needed. They submit their timesheets at the end of the pay period at which time their timesheets are electronically signed and automatically routed to their supervisors. Employees can recall and modify timesheets until they are approved by their supervisors. Employees can approve their timesheets via employee self-service and the terminals.	Y	
2	System should allow for user defined text to accompany employee approvals for the purpose of attestation to timecard contents. **WorkForce Software Response:**	Y	

	The language and method used for employee attestation or manager acknowledgement is completely configurable. Examples include using a checkbox, drop down list, or a free-form text box.		
3	The system should provide the ability for Managers/Supervisors to view employee timesheets that require approval (both summary and detailed level). **WorkForce Software Response:** Supervisors review employee timesheets and can modify, reject, and approve them. Supervisor approval prevents any further modification by employees. Approved timesheets are automatically routed to Payroll for further processing.	Y	
4	The system should provide the ability for Managers/Supervisors to approve the employee's leave/attendance time. **WorkForce Software Response:** Managers can be notified via web message, email or SMS of new requests pending approval. Managers can view, approve or reject the time off requests. Once in the application, he or she can see immediately whether any requests for leave are pending. Unapproved leave is easily identified from the leave summary screens through color coding and status. Employees with pending leave are also displayed on the scheduling screen.	Y	
5	The system should provide ability to define a set of comments used to annotate manual changes and other edits of employee records. **WorkForce Software Response:** Timesheet layouts can include the ability for users to enter freeform comments. Additionally, the comments can be required when performing a change to the timesheet that can include the use of a dropdown list to record a reason code. All changes are tracked in an audit log that is reportable.	Y	
6	Comments should be part of exception reporting capability within the solution. **WorkForce Software Response:** Comments can be part of exception reporting capability.	Y	
7	Free form notes can be attached to any comment to provide more detail associated with the manual change. **WorkForce Software Response:** Free form notes can be included in this manner.	Y	
8	The system should provide the ability for an employee to acknowledge their time card if a change has been made by their supervisor or payroll (i.e. added, edited, and deleted items). **WorkForce Software Response:**	Y	

		Y	N
	Managers can modify a timesheet for an employee, and then reject it with notification of the change. Rejection automatically sends the timesheet back to the employee who must then resubmit it for approval. By resubmitting their timesheet, the employee acknowledges the change.		
9	The system should provide the ability for a Manager to submit modified time cards without the employee's acknowledgement. **WorkForce Software Response:** The application fully supports manager changes without requiring employee acknowledgement. Reasons can be indicated using comments or reason codes, but are not specifically required for changes to a timesheet.	Y	
10	The system should provide an electronic signature for employees to approve their timesheets. **WorkForce Software Response:** The language and method used for employee attestation or manager acknowledgement is completely configurable. Examples include using a checkbox, drop down list, or a free-form text box.	Y	
11	The system should provide an electronic signature for managers to approve time cards for payroll processing. **WorkForce Software Response:** Managers approve employee timesheets with an electronic approval when approving them. Approval automatically routes the timesheets to payroll for further processing.	Y	
12	The system should provide for a pay period lock function for use by payroll to prevent further timecard edits by supervisors or employees. **WorkForce Software Response:** There are several stages where timesheets are locked from changes by various users to ready them for payroll processing. One of the period end processing steps is to lock the timesheets so there are no additional changes made prior to exporting the data to the payroll system.	Y	

Describe completely how your solution addresses, and satisfies each of the requirements in Section 3.1.7

3.1.8 Time Card Edits

	Requirement	Y	N

1	The system should provide the ability to adjust or correct time entries captured in the current period, but not yet paid. **WorkForce Software Response:** Authorized users can modify timesheets in prior or current periods, including, adding, editing, or deleting leave events.	Y	
2	The system should provide the ability to easily navigate from the error report to the time card to make edits. **WorkForce Software Response:** The Time Entry window can be configured to include an exceptions pane that displays any timesheet errors. If an employee makes any time entry errors, the exceptions immediately appear on the screen when the employee saves the timesheet. The exceptions can be configured to prevent the employee from submitting the timesheet, which ensures all exceptions are addressed before timesheet submission. Additionally, WorkForce Time and Attendance provides a Messages dashboard tile and Group Entry Screen for managers to view all of the employees that they are responsible for and display all of the employee activity including exceptions. Exceptions are quickly identifiable by color codes and the manager can quickly drill into the exceptions to make any necessary corrections. These features make managing exceptions and timesheet edits simple. Managers also have the ability to drill into employee timesheets directly from the Approval Screen to make corrections if required. Timesheets that require attention from the manager are easily identifiable by color code on the Approval Screen.	Y	
3	The system should provide the ability to define default time entries for earnings, hours, holiday data, and labor distributions and the ability to override and make changes to this default information. **WorkForce Software Response:** The application can be configured to automatically populate timesheets with scheduled hours so that employees need only enter time that is different. Another option is to configure the application to populate timesheets with default scheduled hours whenever an absence pay code is used.	Y	
4	The system should provide a report that details prior period adjustments and corrections. **WorkForce Software Response:**	Y	

	The solution provides these details.		
5	Allow manager edits for the current pay period but prevent manager edits of the previous pay period after the final previous pay period transmittal has been sent to payroll. **WorkForce Software Response:** Only authorized users will be permitted to edit pay periods.	Y	
6	Recalculate all totals immediately after a value is changed. **WorkForce Software Response:** All calculations are performed in real time with results and alerts displayed and made available for reporting immediately.	Y	
7	All historical employee time and attendance information, including any adjustments, should be available online for audit or review purposes. **WorkForce Software Response:** Timesheet information remains accessible to employees and managers for a configurable length of time. In addition, using WorkForce Time and Attendance's robust reporting tool, you can view information related to an employee's or employee group's work history. The solution lets you select the time frame within which to view the data. WorkForce Time and Attendance includes the following standard reports which report aspects of an employee's work history: *(please see the next page)* • Absence History • Assignment Change History • Employee Summary • Exception History • Hours Worked by Pay Code • Login History by User • Total Hours and Pay by Month	Y	
8	Allow historical time attendance edits by the payroll administrators. **WorkForce Software Response:** Retroactive processing is an area that WorkForce Software has a strong advantage over other vendors. Authorized users (such as payroll administrators) can amend any prior period within a configured timeframe. The amended timesheet is completely separate from the original timesheet. WorkForce Time and Attendance keeps both timesheet versions for auditing and reporting.	Y	

	Amended timesheets are reprocessed with the same set of rules that were effective for the pay period of the original timesheet. Once approved, the application automatically generates adjustments to determine the net difference between the original and the amended timesheets. The net difference is automatically passed to payroll and impacts the next check. If an employee needs the adjustment to be paid immediately, the manager can request an off-cycle timesheet. Off-cycle timesheets are not tied to pay periods and can be issued at any time. Accrual balances and other impacted accumulators will also automatically update with amended timesheets. Authorized users can amend timesheets as many times as necessary to properly calculate an employee's pay. Automatic retroactive processing is also available for events like a retroactive pay increase for a group of employees.		
9	Allow manager to make edits that impact a large group of employees. **WorkForce Software Response:** WorkForce Time and Attendance has a group edit screen that enables mass corrections, edits, updates, and approvals. Managers can also use mobile devices to mass approve their employees' timesheets. They have the option to approve individual timesheets or to approve all.	Y	
10	Support pay or leave incentives based on user-defined conditions. **WorkForce Software Response:** You can set up pay codes for as many incentives as needed and specify how they are calculated within the solution. Incentives can be calculated in any number of ways.	Y	
11	Support floating holidays and multiple work calendars. **WorkForce Software Response:** WorkForce Time and Attendance's Accrual Management functionality can be configured to accommodate the rules of BCSD for the accrual, usage, clearing, termination, transfer, and payout of floating holidays. You can set up as many holiday schedules as required. This is useful in organizations that, for example, have multiple bargaining units, each with its own set of holidays and holiday rules. We support: • Automatically generated holidays • Multiple holiday calendars • Qualification conditions to receive holiday pay, such as working the scheduled day before/after	Y	

	• Pay flat amounts or an average hours amount		

Describe completely how your solution addresses, and satisfies each of the requirements in Section 3.1.8

3.1.9 Interactive Views and Navigation

	Requirement	Y	N
1	The system should provide interactive exception and summary views for common tasks or processes with the capability to drill down on specific employee's records. **WorkForce Software Response:** WorkForce Time and Attendance includes several interactive screens that present summaries of employee time and exceptions, with the ability to drill down to specific employees and/or days to view additional detail, edit time or clear exceptions.	Y	
2	The system should provide the ability to perform actions on employee data within the interactive views, such as edits to timecards and schedules, based on security level of requestor. **WorkForce Software Response:** You will control what employee data is accessible by who and provide the security that allows a user to edit timecards or employee data.	Y	
3	The system should provide the ability for the user to configure the interactive views with user-defined columns. **WorkForce Software Response:** WorkForce Time and Attendance's interactive views can be configured with user-defined columns.	Y	
4	The system should provide flexible sort capability within the interactive views. **WorkForce Software Response:** Most WorkForce Time and Attendance screens allow sorting by simply clicking on the column header if a new sort order is desired. Certain screens provide primary and secondary sorting capability.	Y	
5	The system should provide the ability to multi-select employees within the interactive view and perform group edits. **WorkForce Software Response:** The group entry screen allows a manager to select an entire group, individual employees or multiple employees and make edits as needed.	Y	

		Y	
6	The system should provide the ability to configure interactive views for manager and assign a default view based on manager role. **WorkForce Software Response:** We can configure layouts as part of the implementation such that each employee group (and therefore the relevant manager for each group) can have a different layout that shows the information that's specifically relevant to that group.	Y	

Describe completely how your solution addresses, and satisfies each of the requirements in Section 3.1.9

3.1.10 Scheduling

	Requirement	Y	N
1	The system should have the ability to schedule employees with variable work schedules down to the quarter hour. **WorkForce Software Response:** Users can schedule employees with variable work schedules down to the quarter hour.	Y	
2	The system should allow employees to see schedules online or at building terminals. **WorkForce Software Response:** Employees can view schedule. Schedules look very much like timesheets and are viewed by employee and by pay period. WorkForce Time and Attendance is also able to interface with third party scheduling applications. Schedules can be viewed online or at terminals.	Y	
3	The system should allow for the scheduling of employees for specific activities or projects. **WorkForce Software Response:** Our advanced scheduling tool lets you model specific activities or projects to which employees are assigned on the schedule. These activities can range from regular work models to other activities that the organization needs to track or that may impact the employee's work schedule. Examples of these include vacations, sick time, and other out-of-office time. Models are associated with items such as qualifications and shifts and demand. When Auto Scheduler runs, the system uses qualifications and shift requirements (among other variables such as minimum and maximum staffing) to match models with employees.	Y	

4	The system should send out an automatic email notification if a change has been made that impacts the employee's work schedule within the next 72 hours. **WorkForce Software Response:** Alerts and/or messages can be configured to trigger an automatic email notification to the appropriate user(s) when schedules are updated.	Y
5	The system should allow managers or administrators the ability to add or change an entire work group's schedule online and make the changes visible in real time. **WorkForce Software Response:** Managers and other high level employees can make schedule changes for employees and employee groups. The schedule assignment functionality allows managers to assign a schedule template or rotation to one or more employees within the employee group. The mass edit functionality allows managers to apply the same template or rotation pattern to multiple employees in one step.	Y
6	The system should be able to assign work locations as well as work schedules that may be variable and change frequently. **WorkForce Software Response:** We can schedule any work patterns. Authorized users can assign work locations and schedules that are variable and change frequently.	Y

7	The system should permit employees to request time off and provide a vehicle to notify employees of time off decisions. **WorkForce Software Response:** WorkForce Time and Attendance provides a sophisticated set of workflow capabilities. When a time off request is submitted via the wizard, it is automatically routed to the employee's manager. Managers can then review and act on the request. Once the request is approved it automatically updates within the employee's timesheet and schedule. Time off requests can also be entered via the timesheet. Time off submitted through the timesheet can be routed to multiple approving managers. The application supports as many levels of approval as needed, determined by BCSD's requirements.	Y	

Describe completely how your solution addresses, and satisfies each of the requirements in Section 3.1.10

3.1.11 Miscellaneous and Reporting

	Requirement	Y	N
1	The system should support changes in government regulations which occur over time. **WorkForce Software Response:** When a new law is introduced or an existing law changes, we work with you to confirm how you want that law or rule to be applied. Because we want our customers to retain the flexibility to decide how a new regulation should impact their existing processes, we do not automatically apply legislative changes on your behalf. Even when product updates provide the ability to automate compliance processes related to new laws or regulations, we make such features dormant and give you the option to enable them.	Y	
2	The system should be compatible with Microsoft Outlook and common web browsers. **WorkForce Software Response:** WorkForce Time and Attendance integrates with Outlook, and other SMTP mail servers. WorkForce Time and Attendance allows viewing, printing, saving, and emailing of reports.	Y	
3	The system should provide email notifications when time cards are due, need review, or are approved. The system should send reminders if time card tasks are not performed in a timely manner.	Y	

WorkForce Software Response:

Our thin client, web-based architecture allows all user interaction with the solution through a standard browser with no customer installation, desktop upgrades, Java applets, or other plug-ins needed. Other vendor products often require users to install Java, Flash, or Silverlight.

Supported browsers include Microsoft Edge, Internet Explorer, Chrome, Safari, and Firefox. Intranet and Internet access are web-based and the application can accept input from both limited only by your internal security (firewall) settings.

Web browser support for version 18.3 is indicated in the following table.

Note: You must enable browser cookies.

Browser	Customer O/S	Status
Microsoft Edge	Windows 10	Supported
Internet Explorer 11	Windows 7, 8, 10	Supported
Firefox ESR	Windows 7, 8, 10	Supported
Firefox (Quantum)	Windows 7, 8, 10	Supported
Firefox	OS X 10.9 or higher	Compatible
Chrome	Windows 7, 8, 10	Supported
Chrome	Chrome OS, OS X 10.x	Compatible
Safari 11	OS X 10.11, 10.12, 10.13	Supported
Safari 10	OS X 10.10	Compatible

4

The system should track absences, tardies, or leaves for review by managers.

Y

WorkForce Software Response:

WorkForce Time and Attendance supports configurable policies to detect attendance events as defined by you. Such events can be reported on and counted for measurement purposes, and/or can cause discipline points to be automatically accumulated (and eventually rolled off) according to your rules. WorkForce Time and Attendance can issue automatic disciplinary notifications when certain thresholds of discipline points are reached and can track when disciplinary actions have been taken.

Common attendance management functions include (but are not limited to):

- Track tardy and out early events
- Track the number of unexcused absences
- Manage disciplinary point systems-based tardy or unexcused events
- Reward good behavior by awarding/subtracting points for good attendance
- Define point thresholds when warnings need to be issued
- Remind managers and/or HR via email about the need to issue warnings

5	The system should include an Analytics Module to show Employee Workforce trends (Absences, Perfect Attendance, etc.) metrics and connection to Improving Student Test Scores. The system should be able to produce reports on attendance, absences, tardies, or leaves by employee group, pay code, or work location. Reports should be able to be exported in multiple formats such as Word, Excel, or PDF. The system should provide a bank of popular or saved searches.

WorkForce Software Response:

WorkForce Software's Dashboard KPIs deliver the most critical analytics right to each user's screen, immediately upon opening WorkForce Time and Attendance. Dashboard KPIs put the actionable insight your users need right at their fingertips. With the ability to choose real-time metrics or a daily snapshot, users can see at a glance what action steps need to be taken right away. And with a range of visually engaging, prepackaged KPI charts to choose from, including easy-to-read bar graphs and pie charts, you can choose what information to display, and how—giving your team immediate insight in relation to high-priority business goals, including: hours worked vs. hours scheduled, absence and tardiness data, and more. With the ability to open additional charts at the touch of a button, users have access to more actionable metrics on a single screen than ever before. Designed to facilitate faster utilization of your most important metrics, Dashboard KPIs help you address critical issues in record time, so you can manage your labor spend more tightly across your entire organization.

In addition, attendance rules are configured to BCSD's policies. The solution will notify authorized users of an attendance violation. The application can also be configured to detect trends, manage point systems, and notify appropriate personnel when thresholds have been met that require disciplinary action.

The solution can produce reports on attendance, absences, tardies, or leaves by employee group, pay code, or work location.

Reports are exported to a variety of formats:

- Crystal .RPT file
- PDF
- Excel with formatting
- CSV format
- HTML

Favorites can be defined by users on an ad hoc basis, using any existing row as an example. The user designates which field values should be included in the "favorite" and gives the favorite a name. Subsequently, selecting the favorite is equivalent to selecting the full combination of field values. | Y | |

	The solution can be configured to populate rows on the screen automatically to facilitate data entry, based on favorites or other criteria.		
6	The system should allow managers to assign task codes to employees to ease time entry and ensure time is charged to the correct tasks (i.e. attending a training session). **WorkForce Software Response:** Users can track time against a virtually unlimited number of labor distribution fields such as departments, projects, tasks, etc. WorkForce Time and Attendance supports hierarchical relationships between fields and enforces defaults, dependencies, restrictions, and validations. Multiple user-defined fields and labor levels can be supported to the unique requirements of different groups throughout the organization. Users and managers can also maintain favorite lists of codes.	Y	
7	The system should allow searches on multiple criteria such as type of leave, task code, work group, location, or FML. **WorkForce Software Response:** Reports can include any data from the database along with additional calculated report fields that you can define within the reporting tools and which are calculated dynamically from other fields.	Y	
8	The system should allow the importation of data from external sources. **WorkForce Software Response:** The WorkForce Suite can import and export data to/from Excel and Access databases. The solution also supports Web Services that provide the ability to share data between various systems in real time.	Y	
9	The system should be able to support employees working in multiple jobs or departments during the course of a pay cycle. **WorkForce Software Response:** Multiple Assignments is an automated way to manage employees and/or students that simultaneously work more than one job assignment at different pay rates, accrual rates, and for different managers. For example, in a city government, a police officer may also have a part-time job with the parks and recreation department coaching little league baseball. In a university, a student teacher may also work for the school library. Each of these departments operate as an independent entity with separate pay rules, workflows, and approval procedures. However, the parent organization is responsible for ensuring regulatory compliance and paying the employee with a single check.	Y	

	Multiple Assignments creates and processes a separate timesheet for each position held by an employee so your HR and payroll departments do not have to cross-calculate timesheets. This also ensures that overtime is paid accurately and that there are no FLSA violations. Unlike other workforce management solutions, WorkForce Time and Attendance easily supports this complex process without custom programming or awkward workarounds. **Solution Features:** • Imports and manages multiple job positions per employee • Each can position have a different pay rate, pay rules, and time collection method • Each position can have a different supervisor and/or approval process • Supervisors can cross-reference timesheets to reduce or eliminate overtime • Seamlessly integrated with WorkForce Time and Attendance **Solution Benefits:** • Automated time tracking for multiple positions associated with a single employee • Ensures compliance with FLSA by tracking all hours for a single employee working multiple positions • Enforces business rules by initiating a separate workflow for each timesheet to ensure review and approval is completed by the appropriate supervisor		
10	The system should provide a mechanism to automatically update employee's work location, title, assigned job, or rate of pay when changes are made to the HR system. **WorkForce Software Response:** Usually, employee data is populated from your HR system. This is the data source for the initial population of data, and for ongoing updates to the employee data. This relieves your staff of having to maintain data in multiple places. The WorkForce Suite provides out-of-the-box functionality that includes standard import and export routines to most Human Resource, Payroll, and ERP systems. The solution has interfaces with such leading HR and payroll systems as SAP, Oracle, and ADP. The solution can support a large variety of data exchange methods including exporting and importing files, and/or using Web Services APIs.	Y	

	The WorkForce Suite allows for the exchange of data with any business application. Functions such as data translation and field mapping can be configured as part of the interface. The WorkForce Suite supports importing and exporting data utilizing: • Batch files: XML, delimited (CSV), and fixed-width file formats • Web services: SOAP APIs (+ RESTful APIs to be added in 2019) Most of these interfaces support incremental data exchange where only the changed records are exchanged. These interfaces can be run on demand or on a user-defined schedule.		
11	The system should be able to produce exceptions reports, work comp reports, FML reports, overtime reports, and unpaid leave reports. Reports should be able to be exported into multiple formats and separated by date range, employee work group, location pay code, or status. **WorkForce Software Response:** These reports are all standard and can be exported into multiple formats and separated by date range, employee work group, location pay code, or status.	Y	
12	The system should provide a test environment prior to "going live." **WorkForce Software Response:** By default, we provide Development, Test, and Production environments for the customer's use. Customers will have the opportunity to thoroughly test all policy validations and behaviors in the development or test environments prior to initial system rollout. This is also how you will handle any new or modified policies to ensure the proper enforcement of your rules. The WorkForce Suite includes a tool to migrate data and configuration of the environment from one environment to another, saving time and ensuring accuracy.	Y	
13	The system should be able to support single sign-on capabilities and interface with the district's password and username scheme via LDAP/LDAPS. **WorkForce Software Response:** LDAP is a depreciated feature. The WorkForce Suite supports SAML 2.0 based single sign on (SSO). Both IDP and SP initiated SSO sessions are supported. The WorkForce Suite can automatically authenticate a user based on an established logon, such as a Windows domain session or BCSD portal, without entering an ID/password. The WorkForce Suite can be configured to integrate with nearly any access management system or portal, such as Active Directory, SiteMinder or PeopleSoft Portal.	Y	

	For example, Internet Explorer users can go directly to the WorkForce Suite main menu. In the background, Internet Explorer and IIS use Integrated Windows Authentication to Active Directory to identify the user to The WorkForce Suite based on their Windows domain account. Another common SSO approach is to have users log into the organization's portal website, such as SiteMinder and PeopleSoft Portal applications. Once on the portal, they can simply click on a link to go directly to The WorkForce Suite's main menu. In the background, the WorkForce Suite server communicates with the portal or access management software to establish the user's identity. The WorkForce Suite's single sign-on functionality is highly configurable. It can run a script that allows communication with other software to establish the user's identity based on any information passed by access management system through the browser. The WorkForce Suite can also pass information back and forth between external applications with WebServices, a file transfer or a database connection.		
14	The system should allow system administrators the ability to override system policies. **WorkForce Software Response:** WorkForce Time and Attendance can allow authorized users to override system policies.	Y	
15	The system should support basic word processing features such as spell check, word-wrap, copy, cut, and paste. **WorkForce Software Response:** WorkForce Time and Attendance's graphical user interface provides the ability to copy, cut, and paste single data items, entire days, weeks, and periods including across employees and/or periods. We use the built-in browser spell check functionality for comment / notes fields.	Y	
16	The system should provide an On-Premise Report to show list of all employees in case of emergency, weather event, etc. **WorkForce Software Response:** Managers can have access to reports to help them identify when employees have clocked in and are on premise	Y	
17	The system must support both wired and wireless network connectivity. Wired connections must support a minimum of 100Mbps. **WorkForce Software Response:** The solution supports this requirement.	Y	

Describe completely how your solution addresses, and satisfies each of the requirements in Section 3.1.11

3.1.12 Professional Services

	Requirement	Y	N
1	The selected vendor shall provide project management services to ensure the project is completed in a professional manner, software installation is installed on time and on schedule, and data conversion is completed, accurate, and installed on time and on schedule. **WorkForce Software Response:** WorkForce Software is partnering with Workforce Insight to bring you implementation services. Through the WorkForce Software Partner Certification Program, we have trained and equipped an extensive network of partners, such as Workforce Insight, to help with all aspects of implementation. Centered on a combination of in-depth classroom training and hands-on implementation experience, our multilevel certification program equips certified partners with deep product knowledge and a strong foundation in workforce management best practices. Through proven educational methods and rigorous testing, participants have the opportunity to engage in configuration and deployment training from a functional and/or technical perspective. Extensive hands-on experience further prepares participants to contribute significant, measurable value to each project. By choosing WorkForce Software and our implementation partner, Workforce Insight, you can be confident that you are working with a true expert in matching solution design to business goals, helping you to maximize the return on your investment. A fundamental part of Workforce Insight's implementation approach is our focus on comprehensive project management. Our project management approach engages stakeholders and project teams from the project's earliest stages, establishing clear points of accountability and defining project goals, milestones and metrics from the project's onset. We approach each project in a collaborative manner, fostering an open dialogue throughout the course of the implementation that, in addition to providing project status updates at key stages, solicits regular client feedback. This collaborative exchange helps us continue to provide the highest level of service throughout the workforce management initiative, helping ensure a smooth and seamless implementation from inception to rollout.	Y	

	To ensure a smooth deployment of a workforce management solution, Workforce Insight's project management process ensures effective communication while managing dependencies, change and risk. We always manage projects such that all key dates, milestones, and project phases are reviewed and acceptable to our clients, and hold technical and project reviews and inspections at key stages in the project lifecycle to ensure quality, compliance and success. At the start of every engagement, we develop each project plan to ensure that all deliverables referenced are included in the plan with specific delivery dates; all required tasks to complete those deliverables are documented; and that durations and dependencies of those tasks are signed off by the appropriate client/team resources. In addition, our project team reconciles expended/forecasted hours back to the original scope of work on a weekly basis to ensure that the project stays on budget. Together with the use of best practice standards and proprietary tools, the result is a well-thought-out project approach that has helped to deliver smooth and successful WorkForce Software implementation projects time and time again for numerous clients. A few examples of the tools and other assets we employ as part of our project management process include: • A strong project management methodology that identifies and mitigates risks early • Weekly dashboard-style project reports giving client insight to project plan status, schedule, and budget • Internal tools that track current budget and forecasted burn rate real time, giving project managers early warning to issues with a clear escalation path for resolution • A formal and sophisticated implementation/upgrade methodology that has been designed to handle complex projects • Deep experience in managing change from existing workforce management processes and platforms • Systematic customer satisfaction processes that ensure any project issues are uncovered and addressed		
2	The selected vendor should provide consulting services that include but are not limited to data conversion planning, system interface design, new system design, and new system testing, and new system development. Our partner Workforce Insight will assist in the integration of historical data by creating automated interfaces to import that data. The BCSD will be responsible	Y	

	for providing the data in an acceptable format and validating the data once imported into the WorkForce Software system. Workforce Insight can assist the BCSD at all levels with extended functionality and advanced reporting capabilities. Workforce Insight will conduct unit and system integration testing with the support of the BCSD's resources, and the solution will be delivered to the district for quality assurance (QA) and user acceptance testing (UAT). Workforce Insight will be responsible for unit testing scenarios and BCSD will be responsible for UAT scenarios that will be incorporated into the testing workbook for tracking and documentation of testing performed, successes, and issues for resolution. Workforce Insight will support the district throughout the QA and UAT process. Workforce Insight will also work closely with the BCSD to design and develop the new system, reviewing project requirements to identify unique needs and custom interfaces/scripts, and providing best practice recommendations for those requirements. Our team will also review the system design to ensure alignment with requirements and to ensure best practice recommendations have been interpreted effectively, as well as coordinate any additional approvals that may be required by WorkForce Software internal teams.		
3	The vendor shall offer and include with its response, an annual support agreement with details on the scope of the support provided. **WorkForce Software Response:** Please see **Attachment 3 – WorkForce Software SaaS Agreement**.	Y	
4	The vendor shall provide details on the frequency and method of upgrades, patches, or new releases to the software. **WorkForce Software Response:** WorkForce Software provides three releases per year on a predictable and recurring schedule. Customers will be notified of each release and then submit a request to upgrade to the latest release. WorkForce Software will work with the customer to select an upgrade window.	Y	
5	The vendor shall provide professional training for the system that includes hands-on practice, training materials, user manuals, webinars, newsletters, user conferences, and online help features. The vendor shall provide information on the training materials and support available for users at multiple levels, with differing levels of experience. **WorkForce Software Response:** Please see the table that follows below:	Y	

System Training	User Levels/ Experience Levels	Description/Notes
Hands-On Practice	End Users (Employees & Managers)	Hands-on practice exercises are integrated in end user training materials to reinforce knowledge of learned tasks. Hands-on practice is utilized in both traditional instructor-led training and online web-based training.
Training Materials	End Users (Employees & Managers)	All end user training materials are role specific and completely customized using the client's processes and system configuration. Depending on the needs of the end user audience, training materials could include job aids, user guides, and/or interactive web-based tutorials. Web-based tutorials can be managed by Learning Management Systems accepting SCORM-compliant content. Once developed, all source files are provided to the client for any ongoing maintenance needs.
Training Services	End Users (Employees & Managers)	Besides developing training materials, Workforce Insight provides additional services to ensure the client is able to support (or assist in supporting) the training effort during the implementation and beyond. These services include assistance with developing the overall training strategy, preparing client resources to support training, providing instructor-led training to end users, staffing post-training labs, etc.
Job Aids	End Users (Employees & Managers)	Job aids are end user specific and include detailed steps and screen captures for the most commonly completed tasks. Job aids are developed in Microsoft PowerPoint. Once developed, all source documents are provided to the client for any ongoing maintenance needs.
User Manuals	All Users	We continually update our product documentation with new releases of the software. Online help materials are deployed with the software and are also distributed in PDF format.

			Documentation is distributed with all product updates and is included in the customer service support agreement. Our documentation set consists of the following:		
			• **Release Notes**. Informs users about new features and enhancements, upgrade considerations, bug fixes, and report updates in WorkForce Suite releases.		
			• **Period End Administration User Guide**. Provides reference material and procedures for payroll, human resources, and other staff who need to perform period end activities.		
			• **Accessibility User Guide**. Assist users who are blind or have low vision, in accordance with Section 508 of the Rehabilitation Act of 1998. This user guide is geared toward those using screen reader software for supported Windows or Apple devices. It describes all the functionality and options available in the current version.		
			• User Guides. Teaches employees and managers how to use applications in the WorkForce Suite.		
			• Configuration Guide. Teaches administrative users how to create the most commonly used system policies.		
			• Report Reference Guide. Introduces users to the reporting tool embedded in the application.		
			• **Data Dictionary**. Provides full information on the database schema.		
	Webinars	All Users	WorkForce Software's eLearning Library provides 24x7x365 access to courses on WorkForce Software products, from introductory through highly technical, designed to address the needs of anyone who uses our products. Anytime access is a key benefit of the eLearning Library. Employees can take courses at times that are convenient to their time zone and availability.		

Newsletters	All Users	WorkForce Software communicates best practices through newsletters, webinars, customer emails and via our Customer Success Team.		
User Conferences	All Users	Vision is our annual user conference gives customers the opportunity to meet with their Account Relationship Manager, see the latest product enhancements first-hand, and gather insight from fellow users within WorkForce community.		
Online Help Features	All Users	The solution offers a variety of searchable help screen options such as HTML-based popups and a searchable help engine. There is also an extensive knowledgebase housed in our Customer Community.		

Describe completely how your solution addresses, and satisfies each of the requirements in Section 3.1.12

4.3   Number of installation and maintenance personnel in local service center:

Our installation partner Workforce Insight has a team of 58 installation and maintenance personnel that are individually-based across the United States.

4.4   Number of <u>installation</u> personnel trained on the systems proposed:

Our installation Workforce Insight has a team of approximately 15 personnel fully trained on the systems proposed, many with extensive WorkForce Software experience.

4.5   Number of <u>maintenance/support</u> personnel trained on the systems proposed:

(If the same personnel conduct maintenance, installation and add/moves, fill in only one of the responses above and mark "same" for the subsequent responses.)

All support is provided by WorkForce Software employees located in our Livonia, Michigan headquarters. 24 Support Personnel include 18 Support Analysts, 2 queue managers, and 4 team leads.

The Support Team receives training on the individual requirements of each customer and participates in a handover process from the implementation project team to ensure that they are familiar with the client's configuration, system usage, etc.

The support team is co-located with the implementation team in our Livonia, Michigan headquarters so the staff that

performed system configuration is readily available as resources to the support team.

4.6   How large an area does your maintenance/support force cover?

All technical support is provided from our regional support centers in the United States, United Kingdom and Australia. Please see more details about the US support team in our response to #4.5 above.
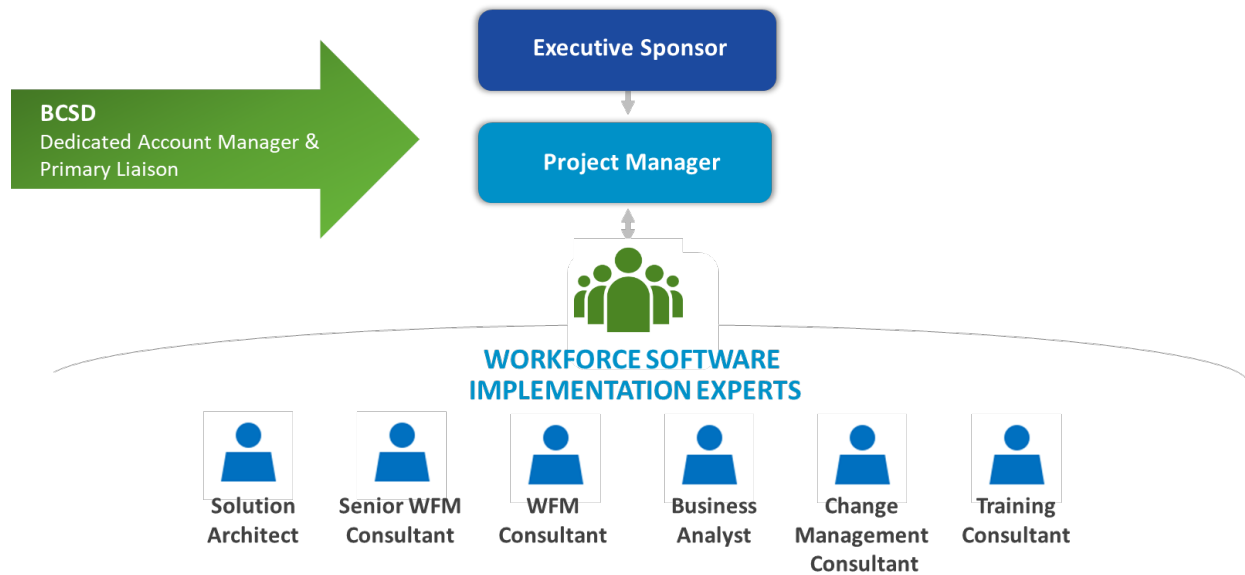
We work with the customer to ensure that we have adequate access to their systems to ensure that we can effectively troubleshoot issues. Once we have identified root cause, we work with the customer to ensure that the recommended fixes are implemented.

4.7   Describe the organization of the department. An attached organization chart will suffice.

Our centralized Customer Support organization—which manages support issues and resolves the majority of them—is supplemented by 3 teams, each staffed with trained experts in specific aspects of our solution:

- Reporting Team: Supplement Support in resolving reporting issues

- Systems Team: Developers, DBAs, Networking Specialists Supplement Support in resolving complex technical issues

- Tech Team: Supplement Support in resolving complex application issues

WorkForce Software maintains close relationships with its customers throughout the life of the partnership. To maintain our relationships, we ensure our customers receive the support they need to keep their operations running. WorkForce Software assigns support professionals who have had specific formal training in your unique configuration, so when you call support you always have a professional on the phone who has intimate knowledge of your system and its configuration, so they can solve your issue as quickly as possible. Please see the proposed implementation structure on the next page.

4.8   Do you plan to subcontract any portion or all the System installation? If so, who would perform the work? Explain if all or partially subcontracted:

Our partner Workforce Insight will be providing all implementation services.

4.9   Name, address, and tax ID of Subcontractor and specify the work to be performed:

WorkForce Software will be utilizing our partner, Workforce Insight, all implementation services.

Business' name	Workforce Insight
Address	1401 17th Street, Suite 850, Denver, CO 80202
Phone	(303) 309-4006
Taxpayer identification number	20-4337322
Point of contact	Joe Green, Vice President (801) 633-1917 (mobile) joe.green@workforceinsight.com workforceinsight.com

3.2 Exceptions

In a separate document included with its offer, Offeror must list and collate all objections, exceptions and observations regarding the specific requested Services and requirements. Such document must provide citations to the specific Section of this Request for Proposal to which the offeror objects, takes exception, or provides observation.

Please refer to the exceptions listed below. We look forward to future discussions to better understand your needs and how we may best help BCSD achieve its workforce management goals.

Item	Exception	
Terms and Conditions		LEGAL NOTICES Copyright © 2000-2018 by WorkForce Software, LLC ("WorkForce Software"). All rights reserved. WorkForce Software believes that it is in the best interest of Beaufort County School District that a comprehensive, definitive requirements listing with appropriate, negotiated contract language be developed and relied upon to engage the successful vendor. This is because Beaufort County School District, as a direct result of the bidding process, may change, add or delete requirements. In this way, both Beaufort County School District and WorkForce Software, will understand the contractual terms and conditions under which those requirements are to be met. If chosen as the successful vendor, WorkForce Software will be happy to engage Beaufort County School District in a discussion regarding contractual terms. WorkForce Software has attached its standard agreements to the RFP for review and consideration by Beaufort County School District. (*continued on the next page*)

To the extent anything contained in the attached WorkForce Software agreements differs from any contractual terms contained in the RFP, WorkForce Software reserves the right to negotiate, and welcomes the opportunity to discuss, such terms in order to reach an agreement acceptable to both Beaufort County School District and WorkForce Software. WorkForce Software is also willing to discuss the inclusion of certain sections of the RFP into the final agreement if such inclusion is a requirement of the RFP.

Notwithstanding anything to the contrary in the RFP, its attachments, or the WorkForce Software response to the RFP, the WorkForce Software response constitutes neither an offer to contract nor acceptance of the RFP contractual terms. Therefore, no contractual relationship shall exist between the parties until the execution of a final, fully-negotiated agreement.

By receiving this information, you agree to keep this information confidential. It may not be duplicated in any way without the express written consent of WorkForce Software, except that you are given permission to duplicate it in electronic or printed form solely for the purpose of distribution for evaluation of our software for your internal use. Distribution should be limited to those employees and/ or consultants who are directly involved in evaluating our solution for your internal use.

	In the absence of a non-disclosure, confidentiality or similar agreement, WorkForce Software may mark pages within this response as 'Confidential'. Exhibit B – Cost Proposal and Attachment 1 – WorkForce Software Financial Statement are confidential trade secrets of WorkForce Software. We respectfully request that they should not be disclosed under any Public Records Act, Freedom of Information Act, or similar statute. We have provided these items to you so that you may fully consider our proposal. However, they contain sensitive financial and/or technical information on our company and products that is generally not known in the market, including financial information and trade secrets which are protected under relevant statutes in your jurisdiction. This information, if disclosed, would cause irreparable harm to WorkForce Software. Pursuant to the relevant statutes, we request that, prior to any disclosure of these pages, you notify WorkForce Software so that we may intervene and challenge such requests in court.
Contractor agrees to accept payment by the South Carolina Purchasing Card for no extra charge. The Purchasing Card is issued by Visa. The purchasing card allows BCSD to make authorized purchases from a vendor without the requirement to issue a purchase order.	While we cannot accept credit cards, we do accept ACH, Wires, EFTs, and Checks.

3.3 General Terms and Conditions

a) Will you comply with all the terms and conditions contained within? (Yes/No)

No. Please see our disclosure on page 1 above as well as **Attachment 3 – WorkForce Software SaaS Agreement**.

b) If your answer to 3.2 a) is "No", list all conditions, objections, exceptions, and/or observations which you cannot or will not meet or accept in a separate document. Provide alternate language of solutions for the District's consideration.

Please see our response to #3.3a above as well as our exceptions listed in #3.2 above.

D. Contracts

Provide a copy of all applicable software license, installation and maintenance/support contracts.

Please see **Attachment 3 – WorkForce Software SaaS Agreement** and **Attachment 4 – WorkForce Software Hardware Rental Schedule.**

4.0.1.6 References

Provide five (5) references of public agencies where services of similar size and scope have been performed in the last twenty-four (24) months. References must include organization names, addresses, names of contact persons, email address and telephone numbers for such references.

Please see our response to Section 4.1 starting on page 15 above.

4.0.1.7 Financial Stability

4.0.1.7 Financial Stability: Each Offeror must provide their audited end of year financial reports for the last three (3) fiscal years. The financial statements should indicate a positive cash flow for three (3) years.

WorkForce Software finished 2017 with record revenues, posting a 32% increase in ARR bookings from the previous year. The company also experienced significant growth in recurring revenue generated by cloud-based workforce management deployments, marking a 34% increase in 2017 versus 2016. For our full 2017, 2016, and 2015 financial statements, please see **Attachment 1 – WorkForce Software Financial Statement**. Please note, this attachment is confidential.

In addition, as a privately-held portfolio company of Baird Capital's private equity division, Workforce Insight is not at liberty to provide standalone financial data to third parties.

4.0.1.8 All Objections

All objections, exceptions and observations regarding the specified Services and requirements collated in a separate document with regards to specific Section to which the offeror objects, takes exception(s), or provide(s) observation.

Please refer to the exceptions listed in Section 4.1 starting on page 59 above.

5.1 5.1. Qualifications – Required Information

Submit the following information or documentation for you and for any subcontractor (at any tier level) that you identify pursuant to the clause titled Subcontractor – Identification. Err on the side of inclusion. You represent that the information provided is complete.

Proposers must meet or exceed these qualifications to be considered for award. Any exceptions to the requirements listed should be on a separate sheet marked "Exceptions" and clearly detailed in proposer's response.

Read and understood. We are responding to this section below and have also provided responses from our subcontractor for implementation services, Workforce Insight. Please see the exceptions detailed above starting on page 59.

a) The general history and experience of the business in providing work of similar size and scope. Five (5) year minimum.

WorkForce Software Response:

In 1999, WorkForce Software recognized that there was a better way for large employers to simplify and manage their complex time and labor needs, and we set out to create it.

Just one year later, the first version of WorkForce Time and Attendance entered the market. As the industry's first fully-configurable time and attendance application, it allowed employers of any size to automate 100% of their pay premiums and attendance policies, without custom code. Organizations began signing on, and WorkForce Software took off.

What started as a small, self-funded startup grew quickly, earning accolades from Deloitte's Technology Fast 500, Brandon Hall Group, and Software Magazine. WorkForce Software has also been recognized on the Inc. 5000 list nine times.

As the company grew, so did our portfolio of products. In addition to WorkForce Time and Attendance, we now offer forecasting and scheduling, a powerful leave compliance and case management tool, and a first-of-its-kind fatigue management application.

WorkForce Time and Attendance remains our flagship product and is used by millions of employees around the world. Most importantly, its inherent flexibility remains a crucial distinction from other workforce management products – and a critical advantage for our customers.

In the past five years, over 250 customers have selected WorkForce Time and Attendance.

Workforce Insight Response:

Founded in 2006 and headquartered in Denver, CO, with a team of consultants individually-based across the United States, Workforce Insight is the leading workforce management implementation and analytics consulting firm. Our sole focus is on workforce management, and our central objective is our clients' success. Our depth of services spans across several workforce management domains, including scheduling and staffing, labor cost and productivity management, timekeeping and pay practices, and labor budgeting and forecasting. These services help our clients and partners optimize and accelerate results, generating significant labor cost savings and sustainable performance gains.

From our earliest beginnings, Workforce Insight has been widely recognized as a trusted workforce management advisor, helping our clients realize a clear path toward an optimal state through the alignment of process and technology with the demands of our clients' organizations. Leveraging our knowledge and experience to provide the highest level of service to our clients based on their unique needs, we have a history of proven success in delivering the full spectrum of service and support necessary to help our clients achieve their workforce management goals. Since our inception, we have successfully completed hundreds of workforce management system implementations, upgrades, and supplemental workforce management consulting engagements, including time, attendance, leave, and scheduling system implementations and payroll-related work.

Below is a list of some of the projects we have performed for various public school districts and other public sector entities, reflecting many projects similar in size and scope to that of the BCSD.

In addition, please see the client engagement profiles included later in this document for examples of WorkForce Software projects Workforce Insight has performed for public school districts and other organizations with workforce management initiatives similar in nature to that of the BCSD.

Vertical	Client Description	Project Description	# Employees	# Locations
Public Sector	State Government System	WorkForce Software Implementation: Requirements Gathering; Configuration; Testing; Training	105,920	
Public Sector	Large City Transit Authority	Timekeeping System Instructor-led Training & Job Aid Development	50,050	
Public Sector	State Government System	WFM System Implementation: Training	3,6573	
Public Sector	State Government System	Time & Attendance System Implementation: Portal Development; Configuration; Testing; Training; Change Management	35,000	1,500

Vertical	Client Description	Project Description	# Employees	# Locations
Higher Education/ Healthcare	University Medical Center & Clinics	Absence Management Training Course & Materials Development; Timekeeper and Scheduler Assessment; Advanced Scheduler and Analytics Implementation and Optimization & End-user Training; WFM Assessment; Pay or Scheduling Practice Standardization; WFM System Implementation & Optimization; Training; Project Management	28,000	1
Higher Education	Large Public University and Research Center	Time & Labor System Implementation	19,609	5
Higher Education/ Healthcare	Premier University Healthcare Network	WFM System Implementation: Leave and Attendance	17,900	3 hospitals; 8 clinics; 1 school of medicine
K-12 Education	Urban Public School District Serving K-12 Students	WorkForce Software Implementation; WorkForce Software EmpCenter Time and Attendance and Absence Compliance Tracker Modules Implementation; Workforce Activity Management; Business Case Evaluation; Timekeeping & Pay Practices; Attendance; Implementation & Optimization; Change Management; Training	17,642	161
Public Sector	State Government System	Time & Labor System Implementation	15,533	
Higher Education	Leading Private Research University	WFM system interfaces; Timekeeping & Scheduling Training Materials Development; Project Management	15,509	
Higher Education/ Healthcare	Top-Ranked University-Affiliated Hospital System	WFM Assessment & Roadmap Development; Initial Deployment Planning and Recommendations; Change Management Services: Organizational Readiness Assessment; Strategy Development; and Communications Plan; Timekeeping & Scheduling System Implementation and Related Configuration; Interface Development; System Optimization	15,000	4
Public Sector	State Department of Corrections	RFP Development for Workforce Management System Vendor Selection; Scheduling & Staffing; Timekeeping & Pay Practices; WFM System Implementation & Optimization; Vendor Evaluation/Selection; Change Enablement & Training; Client-Side PM & Staff Augmentation	14,458	20

Vertical	Client Description	Project Description	# Employees	# Locations
Higher Education/ Healthcare	University Medical Center & Clinics	WFM System Timeclock Configuration and Support; WFM System & Process Optimization: Time & Attendance System Configuration Analysis and Review of Related Processes; WFM System Upgrade	13,800	2 hospitals; 10 clinics
K-12 Education	Large K-12 Public School District	Time & Labor and Attendance & Leave System Implementations; Training; Change Management; Punch Import Interface	10,670	144
K-12 Education	Large K-12 School District in Colorado	WFM System Configuration, including timeclocks; Training Services, including Education Strategy Workshop and Training Plan Development; Training Materials Development; and Train-the-Trainer Training Delivery; Workforce Management System & Process Assessment	9,542	80
K-12 Education	Urban K-12 Public School	Time & Labor System Implementation; Training; Change Management	8,450	101 schools
Higher Education/ Healthcare	Large University Health System	Training; Staffing & Scheduling System Implementation	7,936	11
Public Sector	Large Metropolitan School District	Timekeeping System Training Services: Job Aids; Web-based Training; Instructor-led Training Manual; Virtual Instructor-led Training	6,669	79
Public Sector	Large City Government	Attendance & Leave System Configuration	6,400	
Public Sector	City Government	WFM System Configuration Assessment	3,676	
Public Sector	Administrative and Health Departments of Large State Government System	WFM System Interface Development; Timekeeping System Training Services	3,630	
Public Sector	Large County Government	WFM System Training	3,573	
K-12 Education	K12 School District in Alaska	Fit-Gap Analysis as Phase 1 of WorkForce Software Implementation	3,500	100
Public Sector	City Government	Accruals, Leave & Attendance System Implementation Support: Requirements Gathering; Documentation; Build and UAT Support	3,500	
Higher Education	Fine Arts Museum and School	Workforce Management Assessment; Business Case Development; Vendor Selection; WorkForce Software Implementation & Training	3,000	14
Public Sector	Mid-Size County Government	WFM Assessment; WFM System Optimization & Upgrade; Training	3,000	
Public Sector	Large State Transportation Authority	Timekeeping, Accruals, Leave, & Attendance Implementation; Upgrade; and Configuration Support; Training	2,800	

Vertical	Client Description	Project Description	# Employees	# Locations
Public Sector	City Government	Analytics System Upgrade; Design and Configuration Review; Analytics Workshop	1,872	
Public Sector	State Department of Public Safety	WFM System Training Services: Web-based Training	1,781	
K-12 Education	Large School District in Wisconsin	Timekeeping System Upgrade & Power User Training	1,510	34
Public Sector	State Government System Department of Health	Timekeeping, Absence Management and Activities Implementation: Configuration; Testing; Training; Support	1,500	6
Higher Education	University Bookstore	Workforce Management Assessment; Scheduling Strategy Workshop; Scheduling System Implementation; Training; Change Management	750	5
Public Sector	County Health Department	WFM System Implementation Support: HR/Payroll, Timekeeping, Absence Management, and Activities	568	21

b) Information reflecting the current financial position. Include the most current audited financial statement and audited financial statements for the last three (3) fiscal years.

Please see our response to 4.0.1.7 Financial Stability starting on page 64 above.

c) A detailed, narrative statement listing the three (3) most recent, comparable contracts (including contact information) which have been performed.

Please see our response to Section 4.1 starting on page 15 above. Please note, one Colorado school district recently selected WorkForce Time and Attendance for their 16,000 users.

d) A list of similar projects for which Offeror has performed, at any time during the past three (3) years, services substantially similar to those sought with this solicitation. Err on the side of inclusion; by submitting an Offer, Offeror represents that the list is complete. School District experience is desired.

Please see our responses to 4.0.1.5 Qualifications, B. Organization and Staff Experience on page 13 and a) in this section on page 66 above. In the past three years, over a dozen schools have selected WorkForce Time and Attendance. We look forward to connecting you with our school district customers upon down selection.

In addition, our implementation subcontractor, Workforce Insight, has provided details about recent projects in the **5.1 5.1. Qualifications – Required Information** section starting on page 67.

e) Must have a clear understanding of industry standards and best practices.

Our SaaS architecture sets the bar for industry standards. Our SaaS environment is highly secure, and we maintain ISO 27001, SOC 1 Type II, ISAE 3402 Type II, SOC 2 Type II, and certification under the EU-U.S. Privacy Shield Framework for our cloud-based solution. Equally important, our SaaS solution is fully managed by WorkForce Software—enabling your IT staff to focus on core business activities and minimizing the upfront investment of a workforce management suite.

Our implementation partner, Workforce Insight's workforce management consultants are industry-focused teams workforce management experts with unmatched best practice expertise, bringing an average of 9 years of workforce management experience to the projects they're a part of. As the largest workforce management and analytics consulting practice, Workforce Insight is routinely engaged and invited to deliver thought leadership and educational sessions at industry conferences and forums, educating organizations on current best practices and leading trends in workforce management. We routinely conduct workforce management maturity studies and assess where industries and organizations fall across the WFM continuum toward achieving true workforce optimization. In addition, we host and facilitate a quarterly WFM Advisory Council - a virtual think tank that brings leaders from organizations across the U.S. to share best-practice strategies, lessons learned and next-generation workforce management trends.

f) Offeror shall provide with their proposal copies of all appropriate certifications, licenses and permits, as well as evidence to support the documentation.

We have ISO 27001, SOC 1, ISAE 3402 and/or SOC 2 reports, which can be provided with a mutual NDA in place.

In addition, our partner Workforce Insight has remained a business of good standing in the State of South Carolina since 2009. Please see the screenshot on the next page.

 g) Must have knowledge of and comply with all currently applicable, and as they become enacted during the contract term, federal, state and local laws, statutes, ordinances, rules and regulations. All laws of the State of South Carolina, whether substantive or procedural, shall apply to the contract, and all statutory, charter, and ordinance provisions that are applicable to public contracts in the District shall be followed with respect to the contract.

Please see our standard disclosure on page 1 above. In addition, our implementation partner Workforce Insight is aware of and will comply with all applicable federal, state and local laws, statutes, ordinances, rules and regulations for the duration of this contract. They will also adhere to any and all provisions applicable to public contracts in carrying out the services requested.

h) List of failed projects, suspensions, debarments, and significant litigation.

WorkForce Software has not been debarred and is not currently involved in any actual, pending, or threatened litigation. Other customer issues or concerns have been resolved quickly and amicably.

i) List of at least five (5) references of similar projects for these services.

Please refer to the reference Section 4.1 starting on page 15 above.

j) Pictures showing implementation of vendor's equipment/solution.

Please see the video of installed terminals on our website:
https://www.workforcesoftware.com/video/works-time-clocks/

In addition, please see more details about each terminal in **Attachment 2 – WorkForce Data Collection Terminals.**

Please note: Customers typically handle installation themselves.

5.2 Subcontractor Indemnification

If you intend to subcontract with another business for any portion of the work and that portion exceeds 10% of your price, your offer must identify that business and the portion of work that they are to perform. Identify potential Subcontractors by providing the business' name, address, phone, taxpayer identification number, and point of contact. In determining your responsibility, the BCSD may evaluate your proposed Subcontractors

WorkForce Software will be utilizing our partner, Workforce Insight, all implementation services.

Business' name	Workforce Insight
Address	1401 17th Street, Suite 850, Denver, CO 80202
Phone	(303) 309-4006
Taxpayer identification number	20-4337322
Point of contact	Joe Green, Vice President (801) 633-1917 (mobile) joe.green@workforceinsight.com workforceinsight.com

9.0 Attachments to Solicitation

Minority and Woman Owned Business Enterprise Policy and Requirements

Not applicable