



**REQUEST FOR INFORMATION
No. I-2020-003445-JK**

HR Service Delivery Platform

I. SCHEDULE OF EVENTS

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Issue Date.....May 14, 2020

Due Date and Time.....May 29, 2020 (3:00 pm, PT)

II. ISSUING OFFICE AND CONTACT

ISSUING OFFICE:

The Procurement and Contract Services (PaCS) department of Oregon State University (OSU) is the issuing office and is the sole point of contact for this Request for Information. All concerns or questions pertaining to this Request for Information should be appropriately addressed to the individual identified below:

CONTACT PERSON:

Name: Jennifer Koehne
Title: Procurement Contract Officer

Telephone: (541) 737-7353
E-Mail: Jennifer.koehne@oregonstate.edu

Address: Oregon State University
Procurement and Contract Services
644 SW 13th Avenue
Corvallis, Oregon 97333

III. INTRODUCTION

INTRODUCTION:

This is a Request for Information (RFI), issued by Oregon State University (OSU) Procurement and Contract Services (PaCS). The purpose of this RFI is to solicit input from potential contractors for information pertaining to a human resources (HR) service delivery platform.

OREGON STATE UNIVERSITY:

Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis. Oregon State is one of only two American universities to hold the Land Grant, Sea Grant, Space Grant and Sun Grant designations. Oregon State is also the only Oregon institution to have earned both Carnegie Foundation classifications for Highest Research Activity and Community Engagement, a recognition of the depth and quality of its graduate education and research programs.

Through its centers, institutes, Extension offices and Experiment Stations, Oregon State has a presence in all of Oregon's 36 counties, including its main campus in Corvallis, the Hatfield Marine Sciences Center in Newport and OSU-Cascades Campus in Bend. Oregon State offers undergraduate, master's and doctoral degrees through 11 academic colleges, the Honors College, Graduate School and online Ecampus, enrolling more than 31,000 students from every county in Oregon, every state in the country and more than 110 nations.

IV. REQUIREMENTS

OSU's goal is to provide our employees with the same level of service as our best customers. We believe this is possible when we optimize HR operations and provide employees with a consumer-grade experience. We envision a future where our employees can easily access HR information on demand and connect with HR for any inquiries or requests. Our HR service center representatives would have the technology to easily manage inbound requests, and to escalate as needed. There would be one place to manage global processes and tasks that span across our systems and stakeholders. Employee files would be centralized into one system, to be managed in compliance with local laws and regulations. To meet our goals around service delivery and management, we rely heavily on our internal and external business partners and service providers.

At this time, in order to further our goals, OSU is seeking information for a cloud based HR Service Delivery platform. Specifically, OSU is interested in digital solutions for HR case management, employee file management, and process automation with the following features or specifications

- Integration with Ellucian Banner, DocuSign, Hyland OnBase, Talent Management System (TBD) and telephony system (TBD)
- API web services capabilities, tools, and model
- Single Sign-On (preferably SAML 2.0/Shibboleth compliant)
- Self-service capabilities
- Mobile readiness and adaptability
- HR Knowledge Portal
- HR Case Management
- Employee File Management

- Process Automation including artificial intelligence & machine learning capabilities
- Robust workflow capabilities
- Analytics and reporting
- Personalization of content and of processes
- Intuitive user experience
- Robust security and data privacy
- Role-based access
- Compliance management for employee files
- Meets Accessibility Compliance standards
- Multi-lingual support
- SaaS based delivery model with configurable functionality
- HR administration of the platform - no need for coding skills

OSU's is interested in a platform based on a number of factors including, but not limited to, the following:

- Vendor DNA
 - Company background and stability
 - HR-driven capabilities, investment, and roadmap
 - Creative approaches to improve the project's overall success
 - Demonstration of forward-thinking innovation
- Product Requirements
 - Ability to meet overall functional requirements
 - Flexibility of your company/system to meet current as well as future requirements
 - Intuitive user experience
 - Ability for HR to administer the platform with no coding
 - Proven support for the challenges of higher education, including compliance
- Technology Requirements
 - SaaS based delivery model
 - Seamless upgrades with no maintenance costs associated
 - Ability to address security and privacy needs
 - Ability to easily integrate with existing and future systems
 - Robust production, training, and testing environments
 - Configurability of the application
 - Single Sign On
 - Mobile Readiness and Adaptability
 - Section 508 Web Accessibility compliance
 - Robust Workflow processing
- Implementation Methodology
 - Clear implementation approach
- Timeline
- IT Security Assessment

OSU is asking for suppliers interested in responding to this RFI to answer each question below as clearly and fully as possible, providing screenshots wherever feasible.

1. Company Overview

1.1	Provide company name and primary company contact information.
1.2	Provide an overview of your company.
1.3	Describe the services offered by your company.
1.4	How long have you been providing HR Service Delivery solutions?
1.5	How many customers are using your HR Service Delivery solutions? Of those clients, how many are higher education customers?
1.6	Are you able to provide an HR service delivery platform with the features outlined in the RFI's requirements? If no, please explain.
1.7	Describe the future direction of your solution.
1.8	How can customers influence the future direction of your solution?
1.9	How do you distinguish yourself from your competitors?
1.10	How frequently is the product updated?
1.11	Do you have any complementary product offerings or innovative features we should be aware of?

2. Platform Overview

2.1	What languages are supported within the application?
2.2	Does the application support SSO?
2.3	Does the application integrate with Identity Access Management solutions (SAML 2.0/Shibboleth)?
2.4	Does the application integrate with Core HR or any other HR systems including Ellucian Banner, DocuSign, Hyland Onbase, etc.?

2.5	What other systems can you integrate with? Who are your technology partners?
2.6	How does the integration work? What types of integrations do you offer? Does a customer have the ability to access transactional data directly via something like ODBC? Does this solution have a robust API capability? If so, please expand on what the APIs can do and how they are utilized.
2.7	Do you offer any pre-built integrations from specific HRIS technologies? If so, which ones?
2.8	How are permissions managed?
2.9	What is customizable in the solution? What is configurable?
2.10	What application configuration can be managed post Go-Live by HR? (without IT resources or vendor support)
2.11	Where is the application hosted? Are there more than one data center for disaster recovery purposes? Are all proposed solutions hosted within the United States?
2.12	Describe archiving, backup, and encryption capabilities.
2.13	How frequently is the application upgraded? Describe the process for upgrades.
2.14	What are the ongoing costs associated with administration of the platform? (upgrades, configuration, etc.)
2.15	What operating systems and browsers (including versions) is your platform compatible with?
2.16	What is the user experience for employees? For HR?
2.17	What workflow capabilities are available in the solution? How is that functionality integrated into the application?
2.18	Explain the mobile capabilities and experience.
2.19	Does your solution maintain an audit trail of user activities? What information is contained in the audit trail?
2.20	Is the platform compliant with EU data privacy requirements and GDPR?
2.21	How does your application help HR comply with GDPR and other data privacy requirements?

2.22	How does your application enable HR compliance with local employment laws and regulations?
2.23	What level of granularity is available for setting permissions? Can it be set on user role, employee, document type, geography, etc.?
2.24	Does the application solution meet Section 508 of the web accessibilities standard?
2.25	Describe the training and testing environments which would be available?

3. Functional Overview

3.1 Employee File Management

3.1.1	How are existing documents migrated from existing systems into the application?
3.1.2	How are hard paper documents uploaded into the application?
3.1.3	How are documents classified and categorized? What structures are available? How is metadata managed?
3.1.4	What types of files/documents can your solution support? Please list all available file formats.
3.1.5	Are there any limitations on file size or storage limits? Please explain.
3.1.6	Describe how HR employees access documents for daily business use and auditing.
3.1.7	As documents are generated in other systems, how will they move to the employee file?
3.1.8	Describe the ability to manually or bulk upload documents with metadata tagging.
3.1.9	Do you offer scanning services?
3.1.10	How are retention schedules managed? Can you manage by document type? How is this managed across multiple countries?
3.1.11	Does the platform provide the ability to place documents on legal hold? Describe the process for placing documents on legal hold.
3.1.12	Does the platform provide the ability to identify missing documents?

3.1.12.1	Does the platform provide the ability to request missing documents from employees?
3.1.13	Does the platform provide the ability to identify documents about to expire?
3.1.13.1	Does the platform provide the ability to request about-to-expire documents from employees?
3.1.14	Does the platform provide the ability to search for documents based on metadata? Can you search on multiple criteria? Provide an overview of search capabilities.
3.1.15	How does the platform support GDPR compliance for employers?
3.1.16	What e-signature capabilities are offered? Do you integrate with DocuSign?
3.1.17	Does the platform provide the ability to securely share files? What capabilities are there for sharing files securely with an external party?
3.1.18	Can documents be generated using the application? If so, how is this done?
3.1.19	Can you manage conditional logic in document generation? If so, how is this done?
3.1.20	Does the application support mass document generation? If so, how is this done?
3.1.21	Can your solution automatically create an employee file once the employee is created in the HRIS?

3.2 Knowledgebase

3.2.1	How does your solution support employee self-service?
3.2.2	How do employees search for answers to their questions?
3.2.3	Can employees browse by category in the knowledge portal?
3.2.4	Does the system offer a way to link related content?
3.2.5	Does the solution allow for personalized content based on employee role, department, etc.? If so, how is this personalization managed?
3.2.6	Can knowledgebase articles include images, videos, and other multimedia content?

3.2.7	Are employee requests integrated with the knowledgebase? Can employees make requests directly from within the knowledge base?
3.2.8	Are employees provided with knowledgebase content or structured forms that might be help resolve their requests?
3.2.9	Does the platform offer a solution to provide an HR-user specific knowledge portal?
3.2.10	Can HR Users add knowledgebase content without the need for IT assistance?
3.2.11	Can knowledgebase articles be configured to publish or un-publish automatically?
3.2.12	Does the platform offer a way to highlight important knowledgebase content to users or groups of users?
3.2.13	Does the platform offer a way to show FAQs or frequently viewed articles?
3.2.14	Can HR users view the knowledgebase from an employee's perspective?
3.2.15	Can employees access their personnel documents from within the knowledgebase?
3.2.16	Can employees complete tasks from within the knowledgebase?

3.3 Case Management

3.3.1	How does the solution reduce the number of cases submitted?
3.3.2	How do employees submit a request to HR?
3.3.3	Can HR Users open a case on behalf of an employee?
3.3.4	Can cases be opened based on an email or phone call?
3.3.5	How does the solution ensure HR receives the information they need to act on a case?
3.3.6	Will employees be allowed visibility into the status of their request?
3.3.7	How are cases routed within the solution?
3.3.8	Can cases be assigned to both a single user and group of users?

3.3.9	How does the solution reduce the time spent responding to cases?
3.3.10	Is visibility into the case history provided for HR users?
3.3.11	Does the solution support customer defined SLAs?
3.3.12	Does the solution notify users when a case is assigned to them?
3.3.13	How does the solution provide visibility into cases assigned to them and help users prioritize which cases to work on first?
3.3.14	How are cases escalated? Can escalations occur automatically if an SLA is in danger of being missed?
3.3.15	How are request forms created in the solution?
3.3.16	Do the forms support dynamic logic?
3.3.17	Does the application allow you to create configurable actions or workflows that make it simple for HR users to take action on each request?
3.3.18	Can HR make changes to workflows and forms without IT support?
3.3.19	Does the solution allow the ability to assign priorities to cases manually or automatically?
3.3.20	Does the solution support secure communications related to a case? Do employees have visibility into these communications on requests related to them?
3.3.21	Does the solution support configurable case categories and subcategories?
3.3.22	How does the solution support consistency in how cases are resolved?
3.3.23	Will the solution support sending a satisfaction survey after a case is closed?
3.3.24	Does the solution have the ability to automatically archive case history into an employee's personnel file?
3.3.25	Does the solution provide HR users with visibility into the employee's digital personnel file to speed case resolution?

3.3.26	How does your solution reduce the amount of manual, administrative tasks performed by HR? Are you using any innovative technologies, like Robotic Process Automation, to perform these tasks on behalf of HR?
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3.4 Process Automation

3.4.1	How does your solution support complex HR Processes that extend beyond the HR Service Delivery platform?
3.4.2	Can HR Users build complex process workflows without IT support?
3.4.3	Can complex processes be customized by employee role?
3.4.4	Can a process be modified easily when required? Can tasks be added or removed easily based on the situation?
3.4.5	Can processes be changed to support new requirements or policy changes without IT involvement?
3.4.6	How does your solution enable the standardization of HR processes?
3.4.7	How does your solution speed process completion?
3.4.8	How do employees have transparency into process status?
3.4.9	How are processes initiated in the solution? Please provide descriptions of the multiple methods offered. (Triggered from an employee request, pushed by HR, automated via an import from another solution, etc.)
3.4.10	Does the platform offer the ability to initiate processes for groups of employees?
3.4.11	How does your solution manage documents generated as part of a process?
3.4.12	What types of tasks are supported within the processes? Can these processes be further automated utilizing artificial intelligence and/or machine learning capabilities?
3.4.13	How are forms created and edited? Do they support dynamic logic?

3.5. Reporting and Analytics

3.5.1	What analytics and reporting capabilities are provided?
3.5.2	Are customizable dashboards provided, and can this be defined at the user level?

3.5.3	Can the solution identify process bottlenecks, trends, and performance metrics?
3.5.4	Can report visibility be limited based on a user's role to ensure they only see information they are permitted to see?
3.5.5	Are you able to drill into data subsets in the dashboards? Can the data be snapshotted (i.e., month-to-month and year-to-year) for comparisons? If so, how frequently can that happen?
3.5.6	Can you view the specific data that is visualized within a dashboard?
3.5.7	Can the data be exported out of the solution? If so, in what formats? How often can a customer access the data (i.e., daily, in near-real time, etc.)? Are there additional costs to directly access the data?
3.5.8	Can dashboards be shared or published with other stakeholders?
3.5.9	What kinds of data can be measured?
3.5.9.1	Can we report on SLAs and other KPIs?
3.5.9.2	Can we measure average process time and average task time?
3.5.9.3	How can we understand what employees need?
3.5.10	How do your customers use analytics to improve HR operations?
3.5.11	How do your customers use analytics to improve the employee experience?
3.5.12	How do your customers use analytics to manage compliance?

4. Implementation, Training, and Support

4.1	Provide a sample project timeline including key milestones, roles and responsibilities of both your company and client, and the ways you reduce or mitigate risks related to the implementation.
4.2	Describe what parts of the configuration customers can manage on their own and what must be completed by your team.
4.3	Based on past customer implementations, what is the average number of people hours required for us to implement your product offering?

4.4	What metrics or customer feedback can you share regarding previous implementations?
4.5	How do you ensure a smooth transition between the implementation team and the support available for the run of the project?
4.6	Please describe the training you offer to your clients.
4.7	How do you support customers during implementation and after go-live?

V. SUBMITTALS

In response to this RFI, suppliers are requested to submit the following:

- One (1) electronic copy of your response submitted via email to the contact person identified in Section II of this RFI;
- Narrative describing the respondent's approach to fulfilling OSU's requirements as outlined under Section VI of this RFI. Narrative should follow the sections as broken out in that section;
- Screenshots, marketing material or brochures of goods or services as applicable;
- Examples of work and materials from similar projects as applicable.
- Pricing detail for your solution- what fees are involved (one time and ongoing), how are the fees determined? Are there extra costs outside of the fees? If yes, please detail (i.e. professional services, training, third party integrations etc.)
- Security and privacy policies for your solution as applicable

Responses to this RFI must be received no later than the due date and time indicated in the Schedule of Events. Questions regarding the RFI may be directed to the contact person identified in Section II of this RFI.

Information gathered in this process could potentially be incorporated in an Invitation to Bid (ITB) or Request for Proposal (RFP). Any resulting RFP or ITB will be openly competitive and therefore responses should not be exclusive or restrict competition. This RFI does not obligate OSU to issue an RFP or ITB nor to include information submitted by respondents.

A contract will not be issued directly from this RFI, nor will issuance or acceptance of submittals or subsequent conversations bind OSU into any type of contractual obligation or relationship.