UNIVERSITY OF SOUTHCAROLINA

AMENDMENT NO. 3 TO SOLICITATION

TO: ALL VENDORS

FROM: Bruce Breedlove – Purchasing Department

SUBJECT: SOLICITATION NUMBER: USC-RFP-2305-BB
               PROVIDE HUMAN RESOURCE/PAYROLL/FINANCE
               SERVICES

DATE: October 24, 2012

This Amendment No.3 modifies the Request for Proposals only in the manner and to the extent as stated herein.

THE OPENING DATE HAS BEEN CHANGED TO 11/21/2012 at 11:00 AM (Eastern Time)

THE FOLLOWING PAGES WILL ADDRESS QUESTIONS RECEIVED FROM VENDORS…….

BIDDER SHALL ACKNOWLEDGE RECEIPT OF AMENDMENT NO. 3 IN THE SPACE PROVIDED BELOW AND RETURN IT WITH THEIR BID RESPONSE. FAILURE TO DO SO MAY SUBJECT BID TO REJECTION.

_____   _____
Authorized Signature   Name of Offeror

_____
Date

RESPONSE TO VENDOR QUESTIONS

Vendor 1

Question 1:   If two companies partner with one another – does each of the companies need to complete the detailed information in the RFP?

Answer: No, one vendor must take ownership of the response and be the prime vendor for all partners. The prime vendor should identify in their proposal the partners and the work they will be responsible for.

Question 2:   Does the requirement change if the product solution submitted will be under the main vendor's contract terms and conditions?

Answer: Please refer to the response for question 1.

Vendor 2

Question 1:   Please provide the list of attendees at the pre-proposal conference and the vendors on the phone.

Answer: **Attending the conference**:
USC Purchasing – Bruce Breedlove & Support Team
ADP – Randy Welch
Deloitte – Todd Murphy, Steve Hall, John Starmack
Ciber – James Schmitt
Oracle - Juliette Williams, Lynn Derrick, Todd Balzer, David Pendergast, Joseph Hamel, Chad Moody
On the phone:
Workday
Attain
ADP

Vendor 3:

Question 1:   Page 16 - Lot B. Payroll and Lot C. Finance: How many bank accounts do you have for payroll and finance?

Answer: 1 bank account for payroll and 1 bank account for finance.

Question 2: Page 17 - Lot C. Finance: Describe your current chart of accounts used in the USC General Ledger system - number of accounts, make up of account structure (segments), etc.

Answer: The basic coding structure used in the general ledger financial system is available at the following link: http://busfinance.admin.sc.edu/aboutAccountCodes.shtml. There are over 21,000 active accounts.

Question 3: Page 23 - Proposal Contents B. Technical Proposal #6: Please provide a listing of integrations (interfaces) to/from your current HR, Payroll and Financials systems (or provide a conceptual architecture diagram that identifies the interfaces)

Answer: The University has a business need to interface with internal and external systems in a variety of formats. The University is specifically interested in understanding whether your solution has the capability to interface and exchange information with internal and external systems.

Question 4: Page 44 - Offeror's Checklist: First bullet on page 44 states, "DO NOT INCLUDE ANY OF YOUR STANDARD CONTRACT FORMS!" However, Addendum #2 states we can submit sample legal agreements. Please confirm that vendors can submit sample legal agreements.

Answer: Please delete the statement in the Offeror's Checklist related to submitting legal agreements.

Vendor 4:

Question 1: We do not see procurement mentioned in the RFP, what are the requirements or intentions around the procurement solution at USC?

Answer: Currently the University does not have a procurement solution installed. This is a solution based RFP and the University is interested in all options the Offeror may have to offer.

Question 2: Does the bid require a response to each Lot individually or can our response be any combination of Lots A, B, and or C?

Answer: Yes individually. Offeror may propose a solution for one Lot, two Lots or all three Lots….but whatever the number of Lots the Offeror proposes, each Lot must be submitted individually.   After the Offeror has proposed each Lot separately, the Offeror also has the opportunity to submit additional information if

any of the Lots proposed can be offered as a bundled solution. If this is the case, then the Offeror is to only submit the additional information for the Lots being proposed as a bundled solution. Please refer to RFP Section I**.** Scope of Solicitation:

"RFP FORMAT: This RFP is set up with three (3) individual Lots, Lot A: Human Resources; Lot B: Payroll; and Lot C: Finance. Offerors are to submit their response to each Lot individually as outlined in Section IV. Offerors may respond to the Optional Section with additional information if additional benefits can be offered to USC through the bundling of multiple lots."

Question 3: What system or provider does USC use to process Payroll today?

Answer: The existing mainframe system is comprised of custom-built software written in Cobol.

Question 4: The "Offeror's Checklist" (See page 44 of the RFP) – provides conflicting language "Do not include any of your standard contract forms." We would ask the University of South Carolina to clarify this bullet, since Amendment 2 now allows legal agreements.

Answer: Please refer to the response for Vendor 3, Question 4.

Question 5: In regards to Confidential Information: Can you further define what is "Confidential", "Protected" and "Trade Secret"? In addition what needs to be redacted?

Answer: Please refer to RFP Section II. Instructions To Offerors - A. General Instructions - Submitting Confidential Information: This clause provides references to the S.C. Code of Laws for definitions of these terms.

In addition what needs to be redacted? You are required to mark the original copy of your offer to identify <u>any information that your company considers exempt from public disclosure</u>. You must do so in accordance with the clause entitled "Submitting Confidential Information."

Question 6: Do you currently create a multi-year strategic plan?

Answer: Yes

Question 7: Do you currently budget for grants?

Answer: Yes

Question 8:   Are you using a RCM (Responsibility Center Management) model?   If not, is this something you are interested in possibly for the future?

Answer: The University does not presently use the RCM model. However, USC may be interested in this approach going forward.

Question 9:   Are you currently budgeting at a position/employee level now?

Answer: We budget by position TYPE (object Code 51XXX) within a department and by fund. We do not budget down to the individual person/position/slot. May be interested in doing so going forward.

Question 10:   Do you need to plan around capital expenditures and/or capital projects and/or fixed assets?

Answer: Yes

Question 11:   Do you currently produce a Budget Book?

Answer: Yes

Question 12:   You have listed International Taxation as an area of interest for the RFP. Can you give guidance as to what area of taxation you are interested in? Is your interest sales tax or is it broader than sales tax?

Answer: The University conducts business with international vendors. The University employs international faculty, staff and students. The University also has a business need to be able to reimburse foreign visitors for travel related expenses and honorariums and manage any tax liability associated with these transactions. The University also manages scholarship overages for foreign students from countries with or without tax treaties. Presently we use Windstar to manage tax treaty information and tax liability.

Question 13:   Can you please define "Funds Management" and "Book of Record"?

Answer: Information regarding University "Funds Management" can be found at the following link: http://busfinance.admin.sc.edu/aboutAccountCodes.shtml.

Question 14:   No procurement areas have been listed. Are you planning on using your existing software for procurement and if so, can you provide us some details about your procurement solution?

Answer: Please refer to the response to Vendor 4, Question 1.

Question 15:   Requesting User counts by Departmental Function (i.e HR, Payables, Accounting, Etc.) and how many will be "power users" vs "Self Service users"?

Answer: The University does not have a breakdown of user counts by departmental function. However, it is anticipated that there may be a need to plan for access for over 21,000 "self-service" users and between 500 and 1000 "power users".

Question 16:   Does the University have a measure of the number of concurrent users by lot?

Answer: Please refer to the response to Question 15.

Question 17:   Does university know how many interfaces they have today for each lot (a list is ideal)

Answer: Please see response to question for Vendor 3, Question 3

Question 18:   Is performance management a desired talent management application?

Answer: Yes

Question 19:   Is succession planning and career development a desired talent management application?

Answer: Yes

Question 20:   What current application do you use for learning and is a replacement in scope for this project?

Answer: Blackboard. A learning management solution is not in scope.

Question 21:   What current application do you use for recruitment and is a replacement in scope for this project

Answer: The University uses PeopleAdmin for recruitment. The University would be interested in seeing your solution.

Question 22:   Can we combine all three Lots (A, B & C) into one response if we are proposing pricing based on all three?

Answer: No you cannot combine the Lots, each Lot must be submitted individually and all pricing must be submitted by individual Lot. Also note the RFP states you must not include pricing in your technical response. Technical response and pricing response must be submitted separately. Please refer to the answer for Vendor 4, Question 2.

Question 23:   If a software module is necessary and common within two or more Lots, how does USC want us to address this in our response documents and pricing?

Answer: Please refer to the response for Question 22.

Question 24:   Is there a possibility of getting an extension on the date that responses are due?

Answer: Response due date has been extended to November 21, 2012.

Vendor 5

Question 1:   Please document your current desktop standards (OS, CPU, Video Resolution, Monitor Display, Browser, etc.)

Answer: The University of South Carolina uses both PC's and Mac's throughout the campus. There are no specific standards other than Academic specific requirements, which are on a case-by-case basis on the student level. If your solution dictates a standard, please document this in your proposal where appropriate.

Question 2:   Please provide some detail or documentation on your WAN (MPLS, bonded T-1s, etc.) and Internet connectivity infrastructure (connectivity at each campus, centralized hub and spoke, combination, utilization rates, etc.) by location.

Answer: The University of South Carolina does have multiple high speed connections to the internet. If your solution dictates a specific standard, please document this in your proposal where appropriate.

Question 3:   Please describe any prior experience deploying federated authentication management services using the Security Assertion Markup Language (SAML) standards (1.1, 2.0) and Shibboleth or other middleware authentication technologies?

Answer: If your solution dictates a specific standard or allows for options, please document this in your proposed solution where appropriate.

Question 4: Do you offer only the State plans? Are there any other benefit programs (flex, voluntary, etc.) offered to USC employees?

Answer: The University offers the State plans and other benefits plans. For an overview of the benefit options available through the University of South Carolina visit our website at http://hr.sc.edu/benefits/benefits_summary.pdf and http://hr.sc.edu/benefits/benefits_orientation.html. You may also view the State Employee Insurance Program Benefits Guide at: http://www.eip.sc.gov/ibg/publications/2012_IBG_General_Information.pdf.

Question 5: Can you provide a list of (or link to) the health and welfare plans and vendor names?

Answer: Please see the response to question 4.

Question 6: Please provide a breakdown of the following:
Total Active Employees
Benefits Eligible Employees

Answer: Total Active Employees: See page 18 of the RFP.
Answer: Benefits Eligible Employees: Approximately 5800

Question 7: Please provide approximate number of participants by service
FSA
HSA
LOA
Cobra Continuants
COBRA Qualifying Events (annual estimate)
Dependent Verification-How many Dependents are covered

Answer: FSA: Approximately 1,243
Answer: If you mean Health Savings Accounts, approximately 168
Answer: If you mean Leave of Absence Types, over 40
Answer: COBRA Continuants: This information is managed by the State Employee Insurance Program
Answer: COBRA Qualifying Events (annual estimate): This information is managed by the State Employee Insurance Program

RESPONSE TO VENDOR QUESTIONS

Answer: Dependent Verification-How many Dependents are covered 1,153

Question 8:   Is administration of Pre and/or Post 65 retirees in scope?

Answer: No

Question 9:   If yes, how many retirees are eligible for H&W benefits?

Answer: N/A

Question 10: Is a feed to the pension administrator required to communicate benefit deductions?

Answer: Yes. We will need an interface with the S.C. Public Employee Benefit Authority (PEBA) for the State Employee Insurance Program.

Question 11: Who is the pension vendor?

Answer: S.C. Public Employee Benefit Authority (PEBA).   For additional information on each system in which the University participates select a link below to the PEBA website:

- [South Carolina Retirement System (SCRS)](#)
- [State Optional Retirement Program (State ORP)](#)
- [Police Officers Retirement System (PORS)](#)

Question 12: Please list all the retiree benefit plans, including plan name, vendor.

Answer: The University does not administer the retiree benefits plans. For additional information please visit the S.C. Public Employee Benefit Authority website: http://www.retirement.sc.gov/retired/default.htm.

Question 13: Approximately how many retirees are direct billed for the benefit plan premiums?

Answer: The University does not administer the retiree benefits plans. For additional information please visit the S.C. Public Employee Benefit Authority website: http://www.retirement.sc.gov/retired/default.htm.

Question 14: Please confirm the electronic submission form of an emailed file, or a file on hard disk. Please verify which method of electronic delivery the prospect would prefer and/or both.

Answer: The electronic copy must be submitted on a hard disk with your hard copy responses, do not email your response. Please refer to RFP Section II. Instructions To Offerors - B. Special Instructions

Question 15: What is the preferred method of time entry?

Answer: The University is interested in all time entry methods your solution provides.

Question 16: Will biometric devices be required?

Answer: The University is interested in all time entry methods your solution provides.

Question 17: Do all employees have access to internet for web entries?

Answer: No

Question 18: Is there a population that requires remote time entry such as mobile?

Answer: While it is not required, the University is interested in all time entry methods your solution provides.

Question 19: Are multiple manager approvals required?

Answer: In the situation where an employee's supervisor is absent, the time/leave entries need to route to another manager.

Question 20: Please provide a list of current interfaces to/from 3rd parties.

Answer: See response to Vendor 3, Question 3.

Question 21: Please provide a list of current interfaces required internally.

Answer: See response to Vendor 3, Question 3.

Question 22: Who is the administrator for your 403(b), 401(k) and 457 plans? How often do you send files to them?

Answer: 401(k) and 457 Deferred Compensation plans are administered by PEBA. For additional information regarding the State Deferred Compensation plans select the link: http://www.retirement.sc.gov/defcomp/default.htm. Also, the University manages 27 403(b) plans. For all plans we send files to these plans electronically twice a month.

Question 23: How often do you send files for the retirement plan?

Answer: For Optional Retirement the University sends files twice monthly. For all other plans the University remits data to PEBA once per quarter. However, the University is interested in improving this business process to enhance reporting and data accuracy.

Question 24: How many active garnishments do you have today?

Answer: The University has over 28 active deduction codes and over 132 active garnishment deductions.

Question 25: How many garnishment interpretations are received in a year?

Answer: Approximately 100 per year.

Question 26: How many garnishment payments you make in a year?

Answer: Approximately 672

Question 27: How many local jurisdictions do you file taxes for?

Answer: The University does not process local tax withholdings.

Question 28: Do you have any unions? If so, how many? How many CBA's?

Answer: None

Question 29: How many general ledger chart of accounts do you have?

Answer: 1 chart of accounts for all 8 campuses.