Salem State University
RFI 2017-03 HCM System for Human Resources
Addendum I
Pre-Submittal Conference Minutes
September 9, 2016

Salem State University Attendees: John Keenan, Vice President, Administration; Emily Topacio, Director, Human Resources and Equal Opportunity; Andrea deMello, Manager of Operations, Human Resources and Equal Opportunity; Scott Stanton, Senior Director, Continuous Improvement, Finance; Matthew McAuliffe, Director, ITS, Application Services; Evelyn Wilson, Director, Purchasing and Vendor Relations; Yuniquie Robinson, Purchasing Assistant.

1. Introduction

All callers on the line were asked to identify themselves and specify where they were calling from as they joined the conference. Salem State attendees then introduced themselves to the vendors that were present in the conference call. Vendors were informed by Evelyn Wilson that the call was recorded and that any minutes from the call will be posted to COMMBUYS as well as the Salem State University website under the Purchasing Department's page. She stated that the links for both websites were the following: www.commbuys.com/bso/login.sdo and www.salemstate.edu/3477.php.

2. Overview

Evelyn Wilson began the meeting with asking the callers if they had any questions or concerns that they would like to address with the Salem State University attendees.

3. Timetable and selection of award

Please note that this is an anticipated calendar and may be subject to change.

Release of RFI	September 1, 2016
Phone Conference	September 9, 2016, 11:00 am
Questions Due	September 14, 2016
Answers Posted	September 20, 2016
Response Due Date	September 22, 2016, 3:00 pm

Responses to this RFI become the exclusive property of Salem State University.

4. **Pre-bid Conference Questions & Answers**

- **Q: In your document it does ask for vendors to provide their perspective around implementation so my questions is in the case where there is a vendor that you would like to use and you choose not to use their implementation capabilities are you open to or have you considered third parties for project management implementations and those kind of services?**
    - A: It would depend on what we are implementing. So we do have In-House Project Management and we handle some of our own projects ourselves depending on the complexity of the system and how many modules we are implementing. So, depending on what the project looks like we may look to outside project management.
- **Q: And would that then be part of your RFP if and when that goes out?**
    - A: Yes, we would include that in the RFP.
- **Q: Can someone elaborate on position management and what specifically is included in tracking employee actions within the management system?**
    - A: We are looking to track vacancy's and any type of position changes when it involves promotions or any type of supervisor and department changes, leave, anything that would have an employee record with any type of transactional changes that would happen under a person.
- **Q: And you are not currently tracking that within your HR yet?**
    - A: We are currently using HRCMS which is a Commonwealth platform that is a tool given to us by the state. It's limited as to what kind of reports we can run out of the system so we are looking for a more user-friendly tool that can give us that information in real time without really having to analyze the data in the format that it's currently in. Some of the challenges we have with the faculty side of the house is not only do we have our full-time staff but we have a revolving door of visiting lecturers and instructors so we are trying to figure out not only our full time budget, but our moving part of these temporary contracts.
- **Q: Two questions for you- These typically relate to the information that you will be sending to the state. Can you comment more on the information from this new system that you would anticipate sending or integrating to say PeopleSoft systems? The other question is can you extract a little more on the point around faculty and academic administration. The info you anticipate to pull from your information system and what would be more desirable in managing the academic aspect of your personnel.**
    - A: We are really looking to essentially do everything in-house and be able to upload the data to the state once we have done our manipulations here. We would have to figure out the logistics of that once we have a new system. The data we plan to feed into the system would be all of the above. Right now everything is handled manually. In terms of regular employees you mean administrators and staff classified in 09 unit, they are all handled manually and entered into the state system and then we are able to pull reports and information from the commonwealth information warehouse, but again everything is manual. In terms of faculty, the contractual and academic pieces are from academic affairs where everything is also manual based on the MSCA contract. Anything else that is personnel action, hiring and salary increases, formulary increases, sabbatical or any

kinds of leaves are handled by HR, but all the actions are coming from academic affairs. We are looking to make sure that all the academic affairs processes are included in this when thinking about the new systems.

- **Q: This is a question on Section 6 of the RFI where it discusses providing the opportunity to forecast budgets for the employee personnel. Is this forecasting using the idea that you would like to have additional positions open and what kind of forecasting would you like to use?**
    - A: Let's use retirement as an example. We want to be able to plan so say you tell us you plan for retirement next year, we don't want to stray away from that plan because we don't know what's going on with the contract positions so while we are able to have a handle on some of our fulltime positions and retirements, the variable is the contract positions and are people filling that retirement void with these contract positions and how many people are moving in and out of that so-called line. We just need a better handle on our personnel and that is really the end goal.
    - A: As far as budgeting and forecasting we do the 1 year budget and many iterations of that throughout the year. We also have a 5-year financial plan. We currently put all of our information in an Excel Spreadsheet which is very inefficient there are obviously mistakes made and items missing from formulas. To have a clean and automated system that calculates that for you would save our finance team a lot of time doing the budgets.
- **Q: Here's a follow up question on 6.5: Is this guidance just a minimum and a maximum or are you using something like salaries.com to see the overall industry?**
    - A: We would want to start at a local level and look at the salaries within the university so do a minimum and a maximum to see what the range is per classification. We may also want to bring in some other data which would include the other universities within Massachusetts. That information is obtainable through OpenCheckbook right now.
- **Q: Question on section 12 for learning management- Is the RFI including integration for systems within learning management? Also, what is the evaluation for content as far as online training and content, leadership skills, customer service, etc? I was wondering where this would fit into the RFI? Would this be an all-encompassing system or system integrations?**
    - A: We are hoping for an all-encompassing system. We would really like to find a system that gives us a lot of what we are looking for. We realize that we are asking a lot in one product, but we've currently been operating with piece-mail systems and it has been difficult. Everything we do currently is done manually and is tracked through a spreadsheet so we are looking for a system that does all of the above. That includes online training for employees that send them notifications letting them know that they must participate in an upcoming training for example.
- **Q: Are you looking for some type of off the shelf content that is available outside of a platform provider?**
    - A: Well otherwise we would have to create the content. For example, we are currently trying to recreate a training session an administrator here did before he left on the top of fraud.
    - A: I would add to the positions manager question that the real driver of this and obviously our primary budget buster here on campus is personnel costs and reporting to the

president’s executive council has been challenging to figure out accurately what those costs are on an annual basis. Particularly what our vacancy savings are as a result of the various changes in departments between promotions and separations or over on the faculty side as well which is our real big costs in terms of personnel. So that has really been the push/driving desire to get that addressed. As they mapped out all the processes here in HR, we realized that they need a bigger system. It is ultimately about controlling costs.

  - A: To add to that, we are also looking for a more automated or fully automated way to be able to track those positions that are budgeted by job code, position code, etc. So, we don’t have to go and look up if the position was budgeted in the current budget or not and things of that nature. It’s more of a clean, work-flow process when adding a new position.

5. Post-bid Conference Questions & Answers

- **Q: May companies from Outside USA can apply for this? (From say India or Canada for examples.)**
  - A: Yes they can.
- **Q: Would we need to come over there for meetings?**
  - A: Yes.
- **Q: Can we perform the tasks (related to RFP) outside USA?**
  - A: Yes you can.
- **Q: Can we submit the proposals via email?**
  - A: Yes you may.