SALEM STATE UNIVERSITY

INVITATION TO BID
THIS IS NOT AN
ORDER

1. The university is an agency of the Commonwealth of Massachusetts and is exempt from any State tax or Federal excise tax
2. Unless otherwise stated, the unit price shall be the net price. Separate unit and total prices must be shown if applicable.
3. Unless otherwise stated, all quoted prices shall be FOB university address inside delivery.
   Responses must be received on or before Wednesday, June 5, 2019, by 3:00 P.M. at ewilson@salemstate.edu or if in paper they may be delivered to Evelyn Wilson, Director of Purchasing, 352 Lafayette St. Salem MA 01970 Administration Building second floor room.
4. Salem State University reserves the right to waive informalities and to reject any and all bids; or to accept the bid deemed best for the Commonwealth
5. For additional information:
   Evelyn Wilson, Director of Purchasing & Vendor Relations
   Purchasing Department
   352 Lafayette Street, Administration Building, 2nd Floor, Salem MA 01970
   Phone: 978-542-7321
6. Reference: **RFP 2019-10 HR HCM**

SPECIFICATIONS	UNIT PRICE	TOTAL PRICE
See Attached Specifications		

EQUAL OPPORTUNITY

The contractor agrees not to discriminate against any employee or applicant for employment because of race, sex, color, religious creed, national origin, and/or ancestry. The contractor agrees to post in conspicuous places notices to be provided by the Massachusetts Commission Against Discrimination with respect to the Fair Employment Practice laws of the Commonwealth which are herein made of this contract reference.

Vendor Information

COMPANY

ADDRESS

CITY STATE ZIP

TELEPHONE

AUTHORIZED SIGNATURE

NAME TITLE

FEDERAL EMPLOYER'S ID CODE 9 DIGITs

Salem State University's Human Capital Management System

1. PROJECT OVERVIEW

The purpose of this document is to provide interested vendors with information to help them prepare and submit proposals for a new Human Capital Management System (HCMS) at Salem State University (SSU).

SSU recognizes that a new, integrated HCMS is necessary to meet the needs of the University's goals and objectives as well as to have meaningful interactions with its constituencies. An HCMS should be one of the primary resources used to guide the University in making informed human capital decisions and investments as well as recruiting, onboarding, maintaining, tracking, and engaging its talent. The Human Resources and Equal Opportunity department (HREO) in its current state uses a variety of applications and paper processes to accomplish daily transactions. HREO needs to deploy an integrated system tailored to the University's needs and culture that would create efficiencies throughout the organization.

As part of the strategic goals for 2018-2021, incorporating the goal of "financial vitality and sustainability" will be our focus. This proposal will better serve the University customers including students, faculty, staff, administrators and applicants. At the same time, this proposal aims to build more efficient and streamlined processes that will propel the university forward and highlight customer service and professional development as its top priorities.

Current HREO business processes are mostly paper-based and antiquated, positioning the university in an at-risk status in the areas of risk management and compliance. The strategic plan indicates that we should "identify and implement additional opportunities to contain, reduce, or avoid future growth in costs." HREO must have the ability to track employee actions, support scheduled as well as ad-hoc upload of spreadsheet entries and maintain employee record changes through entries to the state hiring system, Human Resources Compensation Management System (HR/CMS), which serves as the Commonwealth of Massachusetts' Human Resources Information System (HRIS). To this end the University will be better equipped to maintain labor costs. The current reporting system is limited to the data required by Commonwealth standards; at the same time, it does not capture a true representation of the actual, local transactions. The consequences of this include misinterpretation or omission of data. We are constrained and bound to using HR/CMS, and while we need this system to hire and compensate our employees, we will also need HR/CMS to speak to an HCM so that all data is consolidated into one system. At this time, this information is a one-way pathway where we can extract the data but cannot perform the reverse.

In addition to limited reporting tools, HREO has adopted many legacy systems and processes over time that need to be modernized to meet the changing needs of the employees and in turn, the University.

Other HCM essentials include:
1. Reporting and Workforce Analytics
2. Recruiting and Applicant Tracking
3. Onboarding
4. Offboarding
5. Performance Evaluations
6. Learning Management
7. Job Descriptions
8. Organizational Charts
9. Compensation
10. Miscellaneous

System Prioritization:
1. Integrations
2. Security / Information Technology
3. Architecture

ABOUT SALEM STATE UNIVERSITY

Salem State University is one of the largest state universities in the Commonwealth of Massachusetts and is an important partner in the academic, economic, cultural, and intellectual vitality of the greater north-of-Boston region. Salem State offers students a liberal arts education centered on the critical thinking and communication skills that make them career-ready and prepared for life and work in a global environment upon graduation.

Situated in the historic seacoast town of Salem, Massachusetts, just 15 miles north of Boston, on more than 115 acres and five campuses, Salem State provides a diverse community of 9,300 students a high quality, student-centered education—one that prepares them to contribute responsibly and creatively to a global society. The university has active academic partnerships with colleges and universities throughout the world, including China, Japan, the Middle East, and Latin America. Our students hail from 66 countries and 29 states. Salem State also has the most diverse undergraduate student population when compared to our other sister state universities.

Salem State is the largest academic institution in the region and as a premier public university, has among the highest number of academic accreditations among our sister institutions. The university provides 30 undergraduate degree programs in the liberal arts, human services and business, along with graduate programs in 11 disciplines. These programs include education, science, business, criminal justice, and nursing, among others. The university also has a vibrant continuing and professional studies division that offers both credit and non-credit programs.

The university's low student/faculty ratio of fifteen (15) to one (1) provides both undergraduates and graduate students the opportunity to learn in a highly personal and collaborative environment with professors who actively publish and conduct research. With an average of 21 students per undergraduate class, this partnership is supported by low class sizes. Salem State University boasts 11 recent recipients of prestigious Fulbright fellowships, leading *The Chronicle of Education* (2012) to cite it as one of the top Fulbright institutions in the nation among master's degree granting institutions.

Students enjoy a rich and varied on-campus life that allows them to choose from over 65 groups and organizations, 17 varsity teams, intramural sports, and hundreds of student activities throughout the year. Salem State has a nationally recognized residence life program, and with the recent construction of two LEED certified contemporary residence halls, in addition to other campus housing, it is well on its way to achieving a 50 percent residential campus. Viking Hall, a four-story residence for sophomore and junior students, opened in the fall of 2015. The recent construction of the Frederick E. Berry Library and Learning Commons and the Harold E. and Marilyn J. Gassett Fitness and Recreation Center have provided students with still more academic, learning support services, athletic, and recreational opportunities. Salem State's community members are involved in the region—students, alumni, faculty, and staff give countless hours to area nonprofits each year. Community service infuses many aspects of campus life.

2. DESCRIPTION OF CURRENT HR PROCESSES AND SYSTEMS

Reporting and Workforce Analytics

One of HREO's weakest areas is reporting and analytics. HRIS data is readily available from the Commonwealth Information Warehouse (CIW) through the Microsoft Access reporting tool as well as other tracking spreadsheets, yet the University struggles to assemble analytics information useful to key decision-makers pertaining to budget and talent trends. Management does not have insight into internal business trends, which could be useful in anticipating how changes are likely to influence the talent picture.

The University hopes to find a unified HCM system with robust reporting capable of integration with an external HRIS database. The system should have data readily available to core users as well as the President, area Vice Presidents and departmental managers in the form of a dashboard and canned reports containing key information regarding their talent trends. Such reports should utilize real-time data obtained from both the HRIS and HCM systems and managers should have access to real-time workforce metrics related to their area.

Recruiting and Applicant Tracking

In the current process we manage the distinctly unique hiring for the University's three union groups – staff, professional administrators, and faculty/librarian. The currently platform offers templates which capture some general information, but most of it needs to be entered manually, such as: functional and official title of the position, job category, position type, new/replacement (or restructured, and applicable incumbent name), hiring justification, hiring manager, search committee chairs, department, salary range and range to be displayed, FLSA status, bargaining unit, pay grade (classified positions), search committee members, targeted start, (posting) end date. The current posting section contains an overview including work schedule, duties and responsibilities, minimum entrance requirements (MER)/required and preferred qualifications and working conditions. We also capture Chartfield (internal accounting information) posting type and length, additional Paid Advertising requests are captured as well. HREO also tracks the associated position number for benefited hires, supervisor, if the charge meeting and equity reviews occurred within the academic year in which advertising was placed. As outlined above, the template information is limited since the position starts from a posting rather than request to fill. Therefore, all information is entered manually.

The hiring manager enters the position and selects the appropriate approval chain (department head, area head, HREO (Class & Comp), budget, HREO (content review and posting). Once a position is posted and has a pool, HREO meets with the committee to discuss policies and procedures (charge meeting). Prior to interviews, there are equity reviews where HREO vets the pool and questions. Once a candidate is selected, the hiring manager fills out the offer details and launches the offer approval. Currently this occurs after the verbal offer for faculty positions. We would like that to change, so both processes are aligned.

We would prefer a system with unique applications for each union group/position type, as the information and documentation collected differs. The dashboard and user interface should be easy to navigate and hiring committees should only be able to access information about candidates in searches to which they are assigned. We would also like a request to fill approval process and the ability to create and retain job descriptions within the system. Ideally, the advertisement for the position would differ from the actual job description. Approval processes should be fully automated. Simplified reporting should be available to search committee members.

Onboarding

The University's current process includes the following:

Once a new hire (NH) has verbally accepted the position by the hiring manager, the onboarding coordinator (OC) manually creates the offer letter, prints the letter, has it signed by AVP of HREO and then scanned back to OC to send to the NH. An email is sent to the new hire (NH) by the onboarding coordinator (OC) explaining the first steps of onboarding process that include the completion of a background check and the criminal offender records information (CORI). The email also includes the attached offer letter and benefits information. The OC then logs into HireRight, our current background check provider, and enters NH information which triggers a notification to the NH to complete consent forms. For the CORI, the form must be completed by the NH in person or completed in the presence of a notary and sent back to the OC. In addition, the OC sends an email to the Information Technology Services (ITS) department notifying them that a NH is being onboarded. This triggers ITS to send an email to hiring manager requesting information on what access/equipment is needed. Once a completed background and CORI is deemed satisfactory, the OC emails the NH and explains the next steps in the onboarding process. This includes several tasks to be read, completed and signed through the iCIMS onboarding portal and information on the completion of their I-9. In addition, the supervisor is notified and asked to complete a profile for their new incumbent within the internal system called the Employee Management System (EMS). Once the NH has completed the onboarding documents, the OC uses information on the NH personal data form to complete the biographical information in HR/CMS. This system generates an employee ID number that is then entered into the EMS profile by the OC. The employee ID finalizes the EMS profile which triggers complete access for NH and allows ITS to begin setup. At this time, the parking and Clipper Card offices are also notified via email that a NH is being onboarded. The OC will then create a hiring memo via PDF and sends it to the payroll office and HREO. The final steps include the NH completing the I-9 within three days of their hire and the OC manually creating a job description to be sent to the hiring manager which in turn should be reviewed with NH, signed and sent back to OC.

The University hopes to find a unified system that can take all our manual steps and embed them into one centralized HCM. Starting with the offer letter and background check steps, the University wishes to have a system that can handle the creation of our offer letters and have them electronically signed by the NH, keeping in mind that we are a unionized University and each offer language is unique to the NH's role. In addition, it would be ideal to have the background check function embedded into our HCM. While these two steps are handled within the system, it would be ideal to have automated notifications go out to other departments who are involved in the process of onboarding a NH successfully. It is also imperative that we have a system that can generate job descriptions for all NHs and store all jobs descriptions for each individual member of the University. The University needs an HCM that include the ability for e-signature on all onboarding documents. Finally, once all documents are completed and the NH has begun working, such HCM system should be able to integrate with OnBase to automatically import of all onboarding documents related to the NH.

Offboarding

The offboarding course follows the following pattern:

- Employee submits a resignation letter
- HREO sends a confirmation email to the employee that includes some attachments: an exit interview word document, an exit checklist, final offboarding procedures and an unemployment fact sheet
- HREO sends a notification to the immediate supervisor
- HREO uploads the resignation letter to the document storage and retention system, OnBase
- HREO updates a tracking spreadsheet to check off that the above tasks have been completed
- HREO enters an effective end date in the home-grown Employee Management System (EMS) to end system access and resources on the employees last day of work
- HREO manually sets a reminder on the employee’s last date of employment to drop off assets to HREO
- HREO collects university assets from departing employees and collaborates with ITS, Finance, the Clipper Card office, and Facilities for retrieval of assets that are centrally collected in HREO.

A new HCM system would give HREO an opportunity to streamline this process and provide automated notifications as well as track the entire process on a dashboard for HREO. An automated mechanism is necessary to track in-person exit interviews, if employees elect to meet with a representative of HREO. An automated method to receive feedback, such as a survey exit interview form, is necessary to collect the data for reporting purposes. An internal tracking system would reduce risk and provide an opportunity for asset recovery by maintaining inventory. This will not only provide HREO with a tool but the other stakeholders (the Clipper Card Office, Purchasing, Facilities, ITS, Telecom and University Police) as well.

Performance Evaluations

Performance evaluations are completed on an annual basis for our Non-Unit Professional (NUP) employees and clerical/classified AFSCME/Non-Unit Classified (NUC) employees. APA employee evaluations are conducted three times per year with two self-evaluations and one evaluation completed by the supervisor.

NUP Performance Evaluations

NUP evaluations are distributed in June with a return date of July 31st. Human Resources pulls an employee report by NUP union code that includes employee last name, first name, title, department, full/part-time status, supervisor's last name, first name, title, and department. We then post a webpage in the employee portal, Polaris that includes the evaluation template. In addition to the webpage, HREO manually exports all job descriptions out of the OnBase system for all employees listed on the NUP report and saves them on a shared drive folder grouped by supervisor. HREO sends individual emails to each supervisor with the job descriptions for each NUP direct report and the Polaris web link. Once the supervisor and employee have met to complete the evaluation, all evaluation materials are sent to the chief administrative officer (CAO) for review. The chief administrative officer is the supervisor of the supervisor. In the case of this employee population, the CAO may be the president. The CAO shall have the opportunity to review, sign and make comments on the review. Evaluations that receive comments are sent back to the employee for final review and the evaluation is then submitted to HREO. If no comments are made by the CAO, the evaluation can be sent directly to HREO. There are many points at which this manual paper process can stall on someone's desk awaiting signature or mistakenly not be sent to HREO.

In more cases than not, supervisors submit these performance evaluations past the due date. HREO sends a weekly email to executive leadership with a report of outstanding evaluations to prompt the executive team's attention. All incoming evaluations are date-stamped at the front desk upon receipt. HREO logs the evaluation via Excel spreadsheet. HREO reviews the evaluation and confirms that they have received all evaluation elements (all signatures present, a performance evaluation summary, an optional self-evaluation, an old and new job description, if being updated). The evaluation content is reviewed for discipline, low-ratings, mention of promotion/salary increases and/or professional development needs. HREO updates any comments of this nature in the spreadsheet. Marked up job descriptions are submitted to HREO to edit the job description and return to the employee and supervisor for signature. All documents are scanned by the HREO employee assigned to intake and then HREO files all paper evaluations and job descriptions in our Iron Mountain cabinet where it is collected to be sent for archiving at an offsite storage facility.

We aspire to have a notification system that sends out an email notice to supervisors and employees when it is time to administer the performance evaluations. Ideally, the system would lend flexibility to maintain a performance evaluation year-round as a working document. The performance evaluation would be completed through a workflow in the HCM system where supervisors could save a draft until they are ready to submit the final version for their employees' review. The employee should also receive notification to complete a self-evaluation, if they so choose. We anticipate that job descriptions will be available to employees in real-time, but they should also receive a notice to review their job descriptions and sign off prior to submitting their evaluation. They should be able to submit both documents to their supervisor once completed. The employee would then get a notification that their evaluation is complete. Supervisors would be prompted to set-up an in-person evaluation conference. The supervisor and employee would have to e-sign the completed evaluation acknowledging that they have met to review the evaluation. Employees and supervisors would need a method to upload additional documents such as their comments or certifications that may have been received over the evaluation period of July 1 through June 30 of the following year.

APA Performance Evaluations

APA performance evaluations are distributed three times a year with two bi-annual reports completed by the administrator and one supervisor evaluation. The administrator evaluation schedule is determined by the APA union contract. The bi-annual reports are due in April and November while the supervisor evaluation is completed in June. The evaluation template is contractual and not subject to change. It may be reviewed during the collective bargaining negotiations. All APA performance evaluations are completed by employee, supervisor and sent to HREO for inclusion in the personnel file.

As stated in the NUP performance evaluation section, these evaluations are manually distributed and reviewed. Similarly, we seek automation for all portions of this evaluation process.

AFSCME/NUC Performance Evaluations

AFSCME performance evaluations are distributed at different periods depending on the employee's status:

- Annually prior to each employee's anniversary date
- Three-month provisional (for new hires)
- Six-month provisional (for new hires)
- Three-month trial (for lateral moves)

The evaluation template is contractual and not subject to change. It may be reviewed during the collective bargaining negotiations. AFSCME performance evaluations are completed by the employee's supervisor with input from the chief administrative officer and provided to the employee during the performance review meeting. Once all the parties have reviewed and signed, the evaluation should be forwarded to HREO for review and inclusion to the employee's personnel file.

There is a separate database maintained solely for this evaluation process. As with the NUP and APA evaluations, this process should be integrated into an HCM and flow seamlessly through a workflow process. The evaluation workflow should also integrate with the professional development module of the HCM to identify skill gaps and recommend trainings to be documented in the evaluation.

Learning Management

A comprehensive training program has been created for the University without the support of a learning management system (LMS). Most current trainings are in-person, and the planning and execution process is timely. It is best to break up the current process in 3 categories: Event Logistics, Attendance Tracking, and Analytics. The format is similar for the aspirational features portion and included are additional features we believe should be a part of a LMS package.

Event Logistics

The Talent Development (TD) team offers a variety of trainings. Each new program needs to be added to the event registration system by the ITS department. This enables the TD team to access and update the program information, such as training description, date and location. The TD team books the location for the training and publicizes through email notifications. Additionally, the OC manually reviews a list of recently hired employees and sends all new employees, their supervisor and all presenters a calendar invite to attend orientation. For all other events, employees access the registration system on the employee intranet to register for upcoming trainings. Outlook calendar appointments are manually sent by the TD team as they periodically check the registration system for new registrants. Before a scheduled training, the TD team creates and provides a sign in sheet to attendees.

The TD team needs an HCM system that can schedule and create new training sessions for either private (department-specific) or public (open to all employees) and online or in person training sessions. The LMS within the HCM should have the ability to update event registration information (date, location, time, cancellation, etc.), the ability to update content or program description as regularly as needed and the ability to register participants. This system should display upcoming training opportunities on employee and manager dashboards. Additionally, the system should be capable of sending automatic reminder emails for employees about upcoming programs they registered for, including compliance trainings. The system should also be able to send email acknowledgments to all training participants automatically after completion of the training. This email would include a link to a survey within the HCM to evaluate the training program. The email should also include resources and training materials shared during the training session.

Tracking

With the current tracking process, the TD team manually updates attendance spreadsheets after training sessions are held and when new employees are hired. Upon arrival at a training, employees physically sign-in on an attendance sheet. This is then manually added to the tracking spreadsheet.

The LMS within the new HCM should be able to streamline the TD team's workflow so that tracking attendance is efficient. To start, employees should still be able to register themselves for public training sessions and a calendar invite should automatically be pushed to their Outlook calendar and employee dashboard. The TD team should also have the capability to assign online and in-person trainings as appropriate. The LMS should create a registration list that can be printed or exported as a sign-in sheet at an in-person training. Additionally, there should be a "check-in" feature so that the TD team can confirm the employees' attendance. If someone did not register in advance, HREO should be able to override the attendance list and add them to the registration. Administrative assistants should be able to register on behalf of their supervisor.

The attendance should be tracked in the LMS, preferably with field columns for each employee. For example, an employee's ID #, job title, department, union status, and area VP. Ideally, there would be training tracks for employee groups or required training based on the job title or responsibilities, for example, if the employee handles PCI, is a supervisor, or is designated as a responsible employee.

An ideal system would allow for employees to add external training and professional development activities in their LMS profile. Additionally, the LMS should be able to identify how often a training should be taken. LMS core users, such as the TD team, should have a dashboard with a list of employees who are due or overdue for mandatory or compliance-based training.

Analytics

The new HCM should offer dashboards with a quick synopsis of upcoming trainings, attendance data, and more. There should be a reporting tool to allow for analysis right from the dashboard of the TD team. There should be customizable dashboards for managers to view their team and assign training to their employees, a VP dashboard to see their teams and area, and a HREO dashboard to oversee all programming. The TD team is also looking for a function within the LMS for employees to submit suggestions for trainings.

The new HCM should include online learning content that is regularly updated with new programs. The program should be specifically geared towards higher education. All compliance trainings should be offered online to include FERPA, Title IX Responsible Employees, Discrimination and Harassment, and Diversity and Inclusion.

The system should update each employee's performance management profile with a synopsis of their training and professional development status. This should include any compliance trainings that are overdue, any trainings that were suggested by the supervisor but not completed by the employee and a list of all trainings the employee attended. If the individual is a supervisor, it should include whether their direct reports are in compliance with required trainings.

All content and material must be ADA, WCAG & Section 508 compliant.

Employees should have the ability to self-assess their skills and abilities. Trainings should be suggested to fill competency and skill gaps.

Job Descriptions

Job descriptions are either created or edited during different stages of an employee's employment cycle.

New or Replacement Position

After a new or replacement position has been approved by the VP, Budget and HREO through the applicant tracking system, a position is posted, and candidates then apply. After the recruitment phase and the position has been offered to and accepted by the final candidate, a job description is created for the new employee. The following information is collected from the internal and external details of the position to create the job description: for administrators: name of new hire, appropriation, position number, salary, general statement of duties and responsibilities, supervisor name, any incumbents, detailed statement of duties and responsibilities and required qualifications. For classified staff: name of new hire, appropriation, position number, salary, general statement of duties and responsibilities, supervisor name, any incumbents, detailed statement of duties and responsibilities and required qualifications, qualifications acquired on the job, minimum entrance requirements, and license or certifications.

A copy is saved to the local HREO share drive. HREO updates the Excel tracking spreadsheet. The job description is sent to the supervisor (by intercampus mail) with instructions to review the job description with their new employee. The supervisor must retain a copy and send one back to HREO with supervisor and new employee signature. When HREO receives a signed job description, the job description is scanned and filed into the employee's personnel file in OnBase. HREO then updates the Excel tracking spreadsheet to reflect the date returned.

Revision of job description

There are several reasons why an employee's job description is revised throughout their employment:

1. *Maintenance Review and Reallocation*

   HR reviews request for reallocation or maintenance review. If approved by the Administrative Assistant and Labor Relations Director, it is sent to HREO. HREO then edits the old job description using the updated version received. HREO ensures the job description is in proper format (form 30). A copy is saved to the local HREO shared drive and the tracking is updated on an Excel spreadsheet. The job description is sent to the supervisor (by email) with instructions to review the job description with their new employee. The supervisor must retain a copy and send one back to HREO with supervisor and new employee signature. When HREO receives the signed job description, the job description is scanned into the employee's personnel file within OnBase. HR updates the tracking Excel spreadsheet to reflect the date returned.

2. *Reclassification, Promotion, Equity Adjustment or Title Change*

   The Assistant Vice President reviews the request using the personnel action form (PAF) and proposed job description changes. If approved, it is sent to HREO. HREO edits the old job description using the updated version received. HREO ensures the job description is in the proper format (form 30). A copy is saved to the local HREO shared drive. HREO then updates tracking on the Excel spreadsheet. The job description is sent to the supervisor (by mail) with instructions to review the job description with their employee. The supervisor must retain a copy and send one back to HREO with the supervisor and the employee's signature. When HREO receives the signed job description, the job description is scanned and filed into the employee's personnel file within OnBase. HREO then updates the Excel tracking spreadsheet to reflect the date returned.

3. *Supervisor Change or Reorganization*

   After the area VP has approved the changes, the Assistant Vice President of HREO reviews the request using the personnel action form and proposed job description changes. If approved, it is sent to HREO. HREO edits the old job description using the updated version received. HREO ensures the job description is in proper format (form 30). A copy is saved to the local HREO shared drive. HREO then updates the Excel tracking spreadsheet. The job description is sent to the supervisor (by email) with instructions to review the job description with their employee. The supervisor must retain a copy and send one back to HREO with the supervisor and the employee's signature. When HREO receives the signed job description, the job description is scanned and filed into the employee's personnel file within OnBase. HREO then updates the Excel tracking spreadsheet to reflect the date returned.

4. *Performance Evaluation*

The Performance Evaluation is reviewed by an employee in HREO assigned to intake. Any job descriptions attached to evaluation are sent to HREO. HREO checks to see if edits have been made to job description. If so, the edits are reviewed. If edits are approved, HREO edits the old job description using the updated version received. HREO makes sure the job description is in proper format (form 30). A copy is saved to the local HREO share drive. HREO then updates the Excel tracking spreadsheet. The job description is sent to the supervisor (by mail) with instructions to review the job description with their employee. The supervisor must retain a copy and send one back to HREO with the supervisor and the employee's signature. When HREO receives the signed job description, the job description is scanned into the employee's personnel file within OnBase. HREO then updates the Excel tracking spreadsheet to reflect the date returned.

All paper documents that were scanned are placed into the Iron Mountain cabinet for paper archiving.

The university hopes to find an HCM system where all the job description actions are processed through electronic workflow within the system. When hiring a new employee, all the necessary data required for the job description should automatically be pulled through the system and sent through a workflow. The supervisor should be notified via an automated email to review the job description and approve electronically. Automated notifications should be sent directly from the system whenever an action was not taken. Once approved, the new employee would receive notification and the job description would be sent to the new employee for electronic signature. Once employee signature has been obtained, HREO should receive an automated notification of the final version and the signed job description should be automatically sent to the employee's personnel file in OnBase. The new HCM should have the capability of storing all job descriptions for each employee.

Similar workflows should to occur for all other processes. All approvals should happen within the system and during each step, the ability to send the job description back and forth depending on further inquiries. The system should be able to track the date and time of each action and have audit trails embedded for each action.

Organizational Chart

The organizational chart is a graphical representation of the position framework where all of the university's existing positions are budgeted, all new hires are placed in approved positions and actual staffing levels and costs are tracked over time. When viewing the organizational chart, one should be able to view the status of every position within the university.

The current organizational chart process is manual and paper-driven. Executive assistants to each area vice president submit organizational charts to human resources for review. HREO would then update and maintain such org charts twice a year – by August 1 and March 31. Once completed, the org charts are saved in a folder shared with the executive assistants for their future reference. The final version of the org charts is also posted in the Polaris system, the intranet for staff, faculty and administrators, under the HREO area.

The university hopes to find a unified HCM that has the capability of displaying a visual representation of the university's position framework as well as any real time changes to such framework. Each manager and area head should have access to a dashboard containing their local org chart representing the positions directly reporting to them. Having the organizational charts in a system would eliminate the need to send individual chart files to those who frequently request this information, particularly departmental manager and area vice presidents, along with active committees and workgroups.

Compensation

Compensation is a systematic approach of providing monetary value to employees in exchange for work performed. Compensation may achieve several purposes in recruitment, job performance, and job satisfaction. Recruitment and retention of a qualified, diverse employee population is an important goal shared by the university. To some extent, the availability and cost of qualified applicants for open positions is determined by market factors beyond the control of hiring managers. While the University may set compensation levels for new hires and advertise those salary ranges, it does not always do so in the context of other employers seeking to hire from the same applicant pool due to limitations set by the collective bargaining agreements.

The University currently does not have an automated compensation system. New faculty salaries are determined through the Salary Data Form, or Appendix O-1, process of the MSCA collective bargaining contract. New APA and non-unit professional (NUP) administrator position salaries are determined based on market data, title, salary equity within the department and University, and most importantly, job duties as described within the position description. Salaries for new classified AFSCME and non-unit classified (NUC) staff positions are based on the collective bargaining agreement salary chart in force at the time of hire.

The University hopes to find a unified HCM with a built-in compensation system that utilize several components, including job descriptions, salary ranges and structures, and market surveys and data while incorporating Commonwealth of Massachusetts policies, regulations, and collective bargaining provisions.

Integration with a Position Management and Control System

Position management and control is a system of tracking information based on positions rather than employees. This type of system allows for a framework of positions whether there is an incumbent in a specific job. A position management and control system ensure all the university's existing positions are budgeted and all new hires are placed in approved positions by tracking actual staffing levels and costs over time. Position control impacts each employees' full time equivalent (FTE) status, which determines the employee's weekly hours and benefits eligibility. Since the university tracks labor costs at a granular level and budget by position, it would be ideal to have an HCM system that could integrate with a position control system that would track labor costs by how each position is funded, track the incumbent's salary history, FTE distribution, termination, and other critical components. This would help each area, program, and department manage their budget at a high level of detail. This would also allow for all vacancies to be tracked and for salary budgets to be planned and forecasted more accurately, including payouts in the instance of retirement. In the long run, this type of workforce planning and forecasting would prevent excess hiring that may result in budget deficiencies.

Currently, when a new position is approved through the iCIMS requisition approval process, a position is created and coded in the Commonwealth hiring system, HR/CMS. A unique position number is assigned by the system, which is then copied manually and entered in the iCIMS recruiting and applicant tracking system. Employees placed in specific positions inherit the attributes of the position, such as funding information (appropriation, account, fund, department, program, and project or grant) and credential requirements. When vacant positions are filled, the original existing position number created for such position is utilized to ensure continuity and control.

The university hopes to find an HCM system capable of integrating with a position control system as described above.

3. INFORMATION TECHNOLOGY

Funding, Cost, and License Management

At Salem State University, all information technology solutions are managed through the IT operating budget and managed through the IT procurement process. Any service provider must work with IT on a long-term basis to service the subscriptions.

Vendors need to provide a thorough description of their cost structure. Salem State is interested in saving costs through longer-term agreements, but it is concerned about contracts that do not allow us to exit, and force us to continue to pay, after we perceive a failure of service. We are bound by some Commonwealth of Massachusetts procurement rules in this regard.

Vendors need to submit a full schedule of add-on pricing that could occur. This includes polices for change of scope or missed timelines during implementation. Consider the integration and resources needs described below in addressing possible hidden costs.

Hosted solutions should verify that the University's data will reside within the continental U.S. at all times. For a hosted solution, we would like to see the agreements that vendors have with their underlying vendors for hosting and other technology management who have access to the University's data.

Resources

Salem State requires a list of resources that the vendor brings to the initial implementation of their product and present a standard project schedule.

- Do you provide project management, including technical project management for enterprise integrations like identity management, security, and data warehouse/reporting?

- Do you provide experienced analysts? Not just to the core process your product serves but also for related business processes and integrating processes with the University administration as a whole.
- What are your realistic expectations for IT's involvement since we expect to fully integrate with identity, security, data from external sources, and to ship data from your solution to other systems? Due to the volume of specialty cloud products that departments are trying to adopt right now, it's likely that information technology will have difficulty with exact deadlines. Relate this to prior questions about change of scope and hidden costs.

- Does your project expect deep integration with or access to a core, outside system for certain kinds of data? Because we are part of the Commonwealth of Massachusetts system, we might be more limited in the kinds or central, enterprise data we can provide than a vendor might expect.

Technology

- What is the underlying technology stack for the solution? Information Technology Services is interested in the answer to this question even for cloud services.

- What are the data integration mechanisms, like file transfer and web services? Full documentation and examples from past implementations are helpful.

- Where do you support standard data formats for integration, reporting, or compliance?

- Describe the level of support you provide for integration with external authorization and authentication systems.

Ongoing Operational Support, Administration and Maintenance

The vendor should clearly identify the tasks that will be necessary for the "care and feeding" of the system on an ongoing basis. The list of tasks should include ongoing maintenance that must be performed within the system itself as well as tasks required in order to maintain any integrations. If file uploads or downloads are required on a regular basis, these should be called out specifically. The vendor should provide an operational roles and responsibilities document describing how the system is maintained and administered once it is placed into production. Where possible, the vendor should be specific in describing the job title and duties that are expected to be performed by an employee at Salem State University, for example:

- Application Security Administrator (IT): Creates New User Accounts and assigns appropriate access rights

- HR Recruiter (HR): Approves job creation and posting requests, assigns hiring duties to open positions

4. PROJECT PHASES AND PAYMENT STRUCTURE

It is expected that this project may be accomplished in the following phases. Proposals should address everything outlined in the project description, and include anticipated timeframes, cost, suggestions for cost savings, and proposed formats for each phase.

Phase 1: Assessment and Planning

- Needs analysis (propose a strategy for research and consultation with campus community)
- HCM selection
- User research and usability testing
- Assessment of goals, audiences, existing technologies, functional requirements, and development of a preliminary site plan
- Proposal for training content liaisons on content submission process.

Phase 2: HCM Development

- HCM programming and installation
- Technical documentation
- Custom programming (Flash files, etc.)
- Usability test plan

Phase 3: Testing and Training

- Maintenance training and documentation
- Cut-Over/Beta Test Plan

Phase 4: Implementation

- Migration plan

Payments will be made upon satisfactory completion of each phase of the project as determined by Salem State University.

5. DELIVERABLES

It is expected that at various points throughout this project, the vendor will produce the following tangible documents, files or services.

DETAILED PROJECT PLAN

- Name, contact info and qualifications of project manager
- Names and qualifications of developers and designers assigned to project, along with crucial team members
- Project timeline
- Discovery process
- Detailed project budget outline costs for each of the project description items
- Site audit
- Needs assessment
- Description of the university's role/deliverables
- List of involved parties
- Meeting schedule
- User acceptance/usability testing plan
- Migration plan
- Identification and "training" of content providers/liaisons
- Create departmental Web maintenance schedule

- Explanation of process

6. VENDOR INFORMATION

In addition to addressing the specifics outlined in this document and consideration of the Conditions outlined below, proposals must also include the following details about your company:

- Company name
- Location(s)
- Description of company
- Description of the type of services you provide
- Company philosophy
- Total number of designers, developers, etc.
- Average experience level of designers, developers, etc.
- Description of facilities, equipment, physical resources
- List of current projects, as well as the scope and status of each project
- Financial statements for the last three years.
- Disclosure of complaints, current or pending actions, legal or otherwise
- Disclosure of possible conflicts of interest
- References - please provide us with three Higher Education clients that are similar in size to Salem State
- Portfolio of similar projects (completed within the past three years, and a brief explanation of the project)

7. CONDITIONS

Salem State University will not be liable for any costs incurred by respondents in the preparation and production of a proposal or the costs of any services performed prior to receiving approval of the agreement from the Commonwealth of Massachusetts. All proposals and materials submitted in conjunction with the proposals shall become the property of Salem State University for use as deemed appropriate.

1. Salem State University reserves the right to modify the requirements of this RFP after its release. All vendors will receive written notification of any modification to the requirements of this RFP. If any modifications make compliance with the original Procurement Timetable impractical, Salem State University will adjust the timetable accordingly.
2. Vendors who submit a proposal in response to this RFP may be required to give an oral presentation to Salem State University. This shall provide an opportunity for the vendor to clarify or elaborate on the proposal but shall in no way change the original proposal. Salem State University shall schedule the time and location.
3. All finalists will allow a small group of university administrators to perform a site visit (if desired) to the main location that will be handling the account.
4. By submitting a proposal, the vendor agrees that s/he will not make any

claims for, or have any right to, damages because of any misinterpretation or misunderstanding of the specifications, or because of any misinformation or lack of information.

5. The successful vendor will be notified by the Salem State University purchasing office by telephone and confirmed by letter. A contract will then be negotiated with the successful vendor. The contract will, among other provisions, incorporate at least this RFP and the successful vendor's proposal.
6. The university is an affirmative action employer and as such, prohibits discrimination on the basis of race, color, marital status, national origin, mental or physical handicap, political beliefs or affiliation, membership or non-membership in any organization, or veteran status, in any aspect of the admission or treatment of students or in employment. The bidder(s) is (are) expected to adhere to the same principles.
7. Each successful bidder agrees to indemnify, save harmless and defend Salem State University, its trustees, officers, employees and agents from and against any and all claims, demands, actions, debts, liabilities, costs, judgments, and attorney fees, directly or indirectly, arising out of the performance of the activities of said successful bidder under the contract.
8. Each successful bidder is an independent contractor and not an agent of the university and shall not, for any reason whatsoever, represent itself as an agent of the university.
9. Salem State University reserves the following prerogatives:
   - To accept or reject any or all proposals in part or entirety
   - To correct any arithmetic errors in the proposals
   - To waive or modify irregularities in proposals received after notification to the vendor
   - To change any dates specified for the review and selection process
   - To negotiate a payment schedule as part of the award of the contract
   - To request additional information or written clarification of vendor response
10. Omissions, inaccuracy or misstatement may be sufficient cause for rejection of the proposal.
11. Salem State University reserves the right to approve, reject, or cause to be replaced any or all vendor staff assigned to this project. Vendors must further agree to have all proposed vendor team members interviewed and approved by the university.
12. Vendor must dedicate sufficient staff and other resources as required to meet or exceed the mutually agreed upon implementation schedule.
13. Vendors agree to provide evidence of appropriate insurance protection prior to start of work. Appropriate insurance protection shall be deemed to be the coverage outlined in Contractor's Compensation and Liability Insurance, as stated below.
14. Subcontractors
    - Except for vendors designated by the university, the vendor must include a list of subcontractors in their proposal. Said statement must contain a description of the portion of the work which the proposed

subcontractors are to perform/provide and any information documenting that the proposed subcontractors have the necessary skill, integrity, experience and financial resources to provide the service in accordance with this Request for Proposal.

- The vendor shall have sole responsibility to the university for the acts or defaults of said subcontractors and of such subcontractors' officers, agents and employees, each of whom shall, for this purpose, be deemed to be the agent or employee of the vendor to the extent of its subcontract.
- Except for subcontractors designated by the university, all subcontractors must be approved by the university. The vendor shall be fully responsible for the administration, integration, coordination, direction, and supervision of all its subcontractors and of all work. No subcontractor shall perform services at the university until the insurance requirements of this Request for Proposal have been met, and satisfactory evidence has been provided to the university.
- The vendor shall execute with each of its subcontractors and shall require all subcontractors to execute a written agreement which shall bind the latter to the terms and provisions of this Request for Proposal insofar as such terms and provisions are applicable to the work to be performed by such subcontractors.

17. By submission of a proposal, the vendors must certify, and in the case of a joint proposal each party thereto must certify, as to its own organization, that in connection with this proposal the prices in the proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other vendor or with any competitor.
18. All proposals and attachments become the property of the university.
19. The selected contractor will be required to assume responsibility for all services offered in his proposal. Further, the university will consider the selected contractor to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the contractor.
20. Employees of the vendor shall conduct themselves in a professional manner while on campus or while communicating with employees of the university. Salem State University reserves the right to request removal of a vendor's employee from this project if said employee is deemed to be acting unprofessionally or performing below expectations.
21. Throughout this project it is possible that confidential information may be disclosed by either the university or the vendor. Both parties agree to respect the sensitivity of this information and agree not to share this information without permission.
22. All content, concepts, designs, findings, and files developed by the vendor for the university shall remain the property of the university.

CONTRACTOR'S COMPENSATION AND LIABILITY INSURANCE

Contractor shall, at all times, at its own expense, obtain and carry comprehensive liability insurance, property damage insurance and Workers' Compensation insurance of adequate amounts, naming the Commonwealth of Massachusetts, and Salem State University as additional insured. Contractor shall keep such insurance in force for the duration and term of this agreement. All certificates of Insurance or Evidence of Insurance must contain a thirty (30) day written notice of any cancellation, change, or termination of coverage. The insurance required shall be obtained from insurance company(ies) licensed to do business in the Commonwealth of Massachusetts, and have the following minimum limits:

TYPE	**DOLLAR LIMITS**
Contractors Liability (including protective and Contractual Liability)	$1,000,000 combined (bodily injury and property damage) single limit-each occurrence $2,000,000 aggregate
Automobile Liability (owned and Non-owned vehicles)	$1,000,000 CSL – each occurrence
Workers Compensation and Disability	Massachusetts Statutory Benefits

8. PROPOSAL PROTOCOL AND CONDITIONS

No public disclosure or press release pertaining to this RFP, review process, or award shall be made.

Proposals must include a current financial statement and a statement indicating whether or not their company has been profitable for the three prior fiscal years (and parent company if applicable).

LENGTH OF CONTRACT
The term of the contract(s) shall commence on or about July 10, 2017, and continue until the project is completed, provided performance, service, and quality have been and continue to be acceptable to the university. The successful bidder will sign the contract, which will incorporate this RFP and Attachments hereto, and the bidder response to the RFP.

EVALUATION CRITERIA
Each proposal will be evaluated against specifications outlined in the RFP. Only proposals from responsible vendors, as determined by the University, will be considered. Award of this contract will be made to the bidder offering the best value response to the goals and performance

requirements outlined in the RFP. Evaluation shall include, but not necessarily be limited to, the following criteria: price, including the cost of ongoing support services; experience in working with higher education clients; the general reputation of the bidder; bidder's financial and operational ability to meet RFP requirements; quality of the references provided; qualifications of the personnel assigned to work on the project; bidder's functionality, performance, flexibility, and ability to meet the university's needs and timetable; and bidder's plan for providing ongoing support for the Human Capital Management System, including estimated costs, for a three year time period.

After initial review and evaluation, selected bidders who best meet the university's criteria will be invited to make a presentation at the university. The presentations, limited to one hour per bidder, will provide an opportunity for bidders to clarify their proposals through mutual discussion and understanding."

SINGLE CONTRACTOR'S AWARD

This RFP will award a single contract to complete this project only and does not imply any further project awards from Salem State University.

INSTRUCTIONS FOR SUBMISSION OF RESPONSES

Bidders must acknowledge understanding and compliance with each section of this RFP. If the bidder's document conflicts with this RFP, the RFP's language takes priority. This is a closed-bid submission. Bids will be opened and examined according to the timetable set forth in this document. Bidders will not have the opportunity to amend bids once they are submitted. If a bid is not complete, it will not be accepted. Further, if the contract is awarded and then discovered to be incomplete, that award will be rescinded.
Bids must be submitted BEFORE the posted deadline and will not be accepted after. Bids must be bound in some manner (three-ring, stapled, pressure-plate, etc.) and not submitted as loose pages, whether in an envelope or folder pocket. Electronic submissions, including faxed responses, will be accepted; please provide five copies of the submission on individual flash drives. Bidders will submit one (1) copy bid (electronic submissions not submitted through Comm-Pass will be in Microsoft Word or PDF format). Any bid that does not specifically address the RFP will not be considered a valid bid-response.

TIMETABLE

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

- Release of RFP Wednesday May 20, 2019
- Pre-bid conference call: Thursday May 30 from 3:00-4:00 pm
- Conference Call-In Number:

- 1.866.600.4738
- Passcode: 8382195

- Response due date: Wednesday June 5, 2019 3:00 p.m.
- Invited bidder presentations: weeks of June 3 and June 10
- RFP Anticipated Award: June 17
- Contract signed: July 1, 2019
- Contract begins: April 1, 2020
- Selected firm invited to campus to introduce their services/review proposal: week of July 15, 2019

All work outlined in this RFP is expected to be completed no later than December 31, 2021.

COSTS FOR PROPOSAL PREPARATION

Any costs incurred by contractors in preparing or submitting a proposal shall be the contractor's sole responsibility.

DISQUALIFICATION OF PROPOSALS

Salem State University reserves the right to consider as acceptable only those proposals submitted in accordance with all requirements specified in this RFP and which demonstrate an understanding of the scope of the work. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP shall be disqualified without further notice.
A contractor shall be disqualified, and the proposal automatically rejected for any one or more of the following reasons:

- The proposal shows any noncompliance with applicable law
- The proposal is conditional, incomplete, or irregular in such a way as to make the proposal indefinite or ambiguous as to its meaning
- The proposal has any provision reserving the right to accept or reject award, or to enter into a contract pursuant to an award, or provisions contrary to those required in the solicitation
- The contractor is debarred or suspended
- The contractor is in default of any prior contract or for misrepresentation

ADDENDA TO THIS RFP

Salem State may need to issue one or more addenda related to this RFP. Such addenda shall be posted at www.comm-pass.com and the Salem State University purchasing webpage: http://www.salemstate.edu/3471.php. It is the sole responsibility of prospective contractors and other interested parties to familiarize themselves with the web site and visit it regularly during the RFP process for updated information or addenda related to this RFP.

RIGHTS RESERVED

Salem State reserves the right to award in part, to reject any and all proposals, in whole or in part, and to waive technical defects, irregularities and omissions if, in its judgment, the best interest of Salem State University will be served. Should the university determine that only one bidder is fully qualified, or that one bidder is more highly qualified than the others under consideration, a contract may be negotiated and awarded to that bidder.

FINAL CONTRACT

The agreement, if awarded, shall be governed and construed in accordance with the laws of the Commonwealth of Massachusetts, which include but are not limited to the items identified in the Commonwealth of Massachusetts Standard Contract Terms and Conditions (OSD Forms are available at http://www.mass.gov/osd). Attached forms must be completed and signed by applicant. Salem State University intends to use this RFP and the successful proposal as a basis for the agreement.

INSPECTION OF PROPOSALS

Proposals may be available for public inspection upon notice of award and shall be available for public inspection after the contract is signed by all parties.

BIDDER QUALIFICATIONS

All proposals should include the following items for verification of the bidder's qualifications:

- Business Reference Form found at the end of this RFP
- Resume of the person or persons who will handle the account
- A table of organization for the company

CONTRACT INVALIDATION

If any provision of this contract is found to be invalid, such invalidation will not be construed to invalidate the entire contract.

RFP TERMS AND CONDITIONS

The terms and conditions of Salem State University specified below, should be reviewed carefully to ensure full responsiveness to the RFP. The anticipated contract will be, in form and substance, consistent with applicable policy and regulations of Salem State University and the Commonwealth of Massachusetts statutes and regulations regarding the creation and execution of such contract. The failure of any respondent to receive or examine any contract, document, form, addenda or to visit the sites and acquaint itself with conditions there-existing, will not relieve it of any obligation with respect to its proposal or any executed contract. The submission of a proposal shall be conclusive evidence and understanding of the Salem State University's intent to incorporate such terms and conditions into the contract.

Purchase Terms
Where a term or condition contained in this RFP differs from a term or condition set forth in the state contract, the terms or conditions of the state contract shall prevail.

Additional Terms and Conditions
No additional terms and conditions included with the proposal response shall be evaluated or considered and all such additional terms and conditions shall have no force and effect and are inapplicable to this proposal.

- Customer Payment and Privacy Protection Conditions—responses should certify compliance and/or company policies and procedures regarding the following.
    - PCI-DSS Compliance—presently in effect, any merchant processing, storing, and transmitting customer credit card information must show evidence of being PCI compliant. Please submit a Certification of Compliance with your submission.
    - PA-DSS Compliance —effective July 2010, any payment application sold, distributed or licensed to a third party must be PA-DSS compliant. Please identify your firm's plans for compliance in your submission.
    - "Red Flag Rules" —effective November 1, 2009, any third-party vendor of the university that handles, stores or transmits personal identifying information must comply with federal trade Commission's Red Flag Rules. Please identify your company's Red Flag Administrator and policies related to this regulation. Please note: any submission that does not address these conditions will be deemed to be incomplete and subject to disqualification from consideration.

PRICING
Quoted pricing shall remain firm for the entire term of the contract.

EXCUSABLE NON-PERFORMANCE
The vendor will use its best effort to provide satisfactory and uninterrupted service as described in the RFP. The vendor will not be responsible or in default for any failure of service arising from an act of God, civil riot, war, restrictions imposed by governmental authorities, or other causes determined by Salem State University to be beyond the vendor's control.

CONTRACT TERMINATION
If the contractor persistently disregards the laws, ordinances, rules, regulations or orders of any authority having jurisdiction, or otherwise is in substantial violation of a provision of the contract documents, or the university deems the services provided to be unsatisfactory, then the university may, without prejudice to any right or remedy and after given the carrier thirty (30) days written notice, terminate the employment of the carrier. The university shall be obligated only for those services rendered and accepted prior to the date of Notice of Termination.

CONTRACT RENEWAL

The contract may be renewed upon the same terms and conditions, provided that the parties agree on pricing terms. The vendor shall no later than thirty (30) days before the expiration of the contract provide written notice of its intent not to renew the contract or of any changes to pricing in may require.

EMPLOYEES

All workers performing services shall be employees of contractor and shall not under any circumstances be considered employees of Salem State University. Contractor shall provide and be responsible for all required services and benefits with respect to its employees, including but not limited to worker's compensation and unemployment insurance.

EQUAL EMPLOYMENT OPPORTUNITIES REQUIREMENTS

In entering into any contract resulting from this RFP the contractor agrees not to discriminate against any employee or applicant for employment because of race, sex, color, religious creed, national origin, and/or ancestry. The contractor agrees to post in conspicuous places notices to be provided by the Massachusetts Commission Against Discrimination with respect to the Fair Employment Practice laws of the Commonwealth, which are herein made of this contract reference.