

**NORTH HUNTERDON-VOORHEES
REGIONAL HIGH SCHOOL DISTRICT BOARD OF EDUCATION**
1445 State Route 31
Annandale, New Jersey 08801
"Providing Success for All Students"

**EVALUATION OF PROPOSALS
FOR**
Enterprise Finance, Human Resource and Payroll Software

Susan Press, School Business Administrator

EVALUATION COMMITTEE
Guillermo Vargas-Dellacasa - Coordinator of Technology
Khalida Jakubas – Computer Applications Manager
Richard Bergacs – Assistant Superintendent of Schools

January 25, 2018

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I. Background

On November 20, 2017, the Board of Education issued a Request for Proposals (RFP FHRPR2017-REV1), pursuant to provisions of law authorizing competitive contracting, for Enterprise Finance, Human Resource and Payroll Software. Two proposals were received and opened on December 19, 2017 at 10:00 a.m. The following vendors submitted proposals:

- Paychex, Inc. of Piscataway Township, NJ
- Weidenhammer Systems, Inc. of Wyomissing, PA

II. Evaluation Team

Both proposals were evaluated in accordance with the methodology described in the RFP. Susan Press, School Business Administrator, facilitated the evaluation with a committee formed for the specific purpose of evaluating the proposals. The committee members were:

- Guillermo Vargas-Dellacasa - Coordinator of Technology
- Khalida Jakubas – Computer Applications Manager
- Richard Bergacs – Assistant Superintendent of Schools

A signed *Conflict of Interest Certification* form is on file for each of the committee members.

III. Initial Evaluation

The committee performed an initial review of both proposals to verify that all of the information requested in the RFP was included; as well as to attest that each solution proposed corresponded to what was required in the RFP. The committee considered the following for each response:

1. Whether it followed all instructions for responses as described in the RFP

2. Whether it provided all information requested in the RFP.
3. Whether it properly addressed all critical and supplementary questions of section IV of the RFP.
4. Whether it provided a feasible training plan.
5. Whether it provided a viable procurement plan.

The respondents were required to submit a total integrated solution consisting of Finance, Payroll and Human Resource module as described in the Critical and Supplementary questions of section IV of the RFP.

Paychex's proposal did not include Finance or Human Resource modules and therefore, was determined to be non-responsive, and was eliminated from further consideration.

Weidenhammer's proposal included all of the required modules and was determined to be responsive.

IV. Detailed Evaluation of Weidenhammer's Proposal

Given that the committee had to evaluate a single responsive proposal our focus was to evaluate the full merits of the proposal and make sure it was indeed a valid solution for the requirements presented in the RFP. The following steps were taken to that extend:

Vendor Demonstration

On January 3, 2018, Weidenhammer provided an on-site demonstration of their software solution "Alío" and implementation strategy to District personnel including representatives from Accounting, Human Resources, Payroll, and Technology. The demonstration was followed by Q&A session to clarify some items listed in the RFP response as well as functionality presented in the demo. The consensus of the attendees was that the solution presented was in line with the requirements of the District and far exceeded the capabilities and features of the existing software.

Reference Checks

Reference checks via telephone were conducted with the following Districts as listed in Weidenhammer's proposal:

District Name:	River Vale School District
Enrollment:	1,150
Contact Name:	Ms. Kelly Ippolito
Contact Position:	Business Administrator
Phone Number:	201-358-4020

District Name:	Morris Hills Regional School District, NJ
Enrollment:	2,700
Contact Name:	Ms. Joann Gilman
Contact Position:	Business Administrator
Phone Number:	973-664-2282
Contact Name	Neil Charles - Supervisor of Technology Service
Phone Number	973-664-2256

District Name:	Dover School District
Enrollment:	3,000
Contact Name:	Ms. Catherine Jenisch
Contact Position:	Business Administrator
Phone Number:	973-989-2005

District Name:	Haddon Twp School District
Enrollment:	2,155
Contact Name:	Ms. Jennifer Guald
Contact Position:	Business Administrator
Phone Number:	856-869-7706

All contacts spoke favorably to Weidenhammer's solution and indicated the system meets their expectations and allows them to improve their business operation.

On-Site Visit

Morris Hills Regional School District in Rockaway, NJ was selected for an on-site visit because its demographics and configuration closely resemble those of North Hunterdon-Voorhees Regional High School District (i.e. two high schools with approximately 3,000 students overall enrollment).

The on-site visit was conducted on January 11, 2018 from 9:00 a.m. to 11 a.m. The attendees from North Hunterdon-Voorhees Regional High School District included Rich Bergacs, Assistant Superintendent, Guillermo Vargas Della-Casa, Coordinator of Technology, and Khalida Jakubas, Computer Applications Manager. Joann Gilman,

Business Administrator / Board Secretary and Neil Charles, Supervisor of Technology Services from Morris Hills Regional School District demonstrated various modules (Payroll, HR and Finance).

Proposal Analysis

The committee evaluated Weidenhammer's proposal, grading the vendor's ability to satisfy each RFP requirement and implement the project. The checklist below summarizes the findings of the evaluation:

Requirements	Excellent	Adequate	Deficient
<i>Proposed software Includes modules for Finance, Budget Management, Requisitioning, Purchasing, Accounts Payable, Fixed Assets, Human Resource management, Position Control, Position Budgeting, Payroll Processing and Portal systems.</i>	X		
<i>Ability to process future dated transactions for all types of HR transactions.</i>	X		
<i>Ability to create reports, roll-ups, or organization charts for all of the various supervisory relationship codes.</i>	X		
<i>Allow easy data import and export.</i>		X	
<i>Ability to integrate all areas of the District Financials, Human Resources and Payroll Operations and interface with all of the existing systems currently in place via a single sign-in.</i>	X		
<i>Ability to automate business processes using a workflow engine, workflow modeling and workflow definition tool that will allow the District to automate many multi-step processes.</i>	X		

<i>Provides an up-to-date, online company employee directory, deployable over the company intranet.</i>		X	
<i>Contains detailed attendance-tracking functionality.</i>		X	
<i>Handles file attachments (such as applications, resumes, reviews) to any applicant or employee record.</i>	X		
<i>Automated notification of status changes, new hires, or terminations to other departments such as Payroll and Information Technology.</i>	X		
<i>The ability to provide effective-dated transactions with full history for employee records and valid table values.</i>	X		
<i>The ability to automate workflow and track a transaction through its life cycle from inception to execution, including approvals, routing and historical tracking.</i>	X		
<i>Provides an easy to use ad hoc reporting tool for retrieving information, without requiring any particular technical expertise or assistance.</i>		X	
<i>The ability to integrate information from payroll and finance to provide consolidated reporting.</i>	X		
<i>Comprehensive security that restricts users to appropriate screens, fields and records based on their job functions.</i>	X		
<i>Provides complete government reporting and compliance capabilities.</i>		X	
<i>Provides a single point of data entry for HR and Payroll information to reduce/eliminate data redundancy.</i>	X		
<i>Ability to link contracts to vendor files.</i>		X	

<i>Supports multiple items per contract and multiple contracts per vendor.</i>	X		
<i>Ability to support the conversion of awarded bids, including multiple and split awards, to approved contract(s).</i>		X	
<i>Provides complete government reporting and compliance capabilities.</i>		X	
<i>Enable employees to have access to a personal profile that includes demographic, benefits, and compensation information. The functionality requires the integration of information that comes from third parties, such as 401(k) balance.</i>	X		
<i>Method for identifying employees, applicants, and retirees by a unique identification number other than the SSN or SIN.</i>		X	
<i>Method of tracking both effective date of change, and date entered into system (transaction date).</i>		X	
<i>Web-enabled and includes web based self-service applications for faculty and staff as appropriate.</i>		X	
<i>Provides alerts via e-mail to date- and time-sensitive events (e.g., review times, payroll changes, status of new hires).</i>	X		
<i>Has provided accounting and payroll software for more than 20 years.</i>		X	
<i>Tutorials, Wizards and Help screens are worthwhile, in-depth and included with the product.</i>		X	
<i>Provides tools for the District to extract data as necessary for monthly Board and annual State reports.</i>	X		
<i>Provides secondary environment for test, development, training, etc.</i>	X		

In summary it was found that the solution provides adequate or excellent support for all the requirements presented in the RFP.

V. Findings and Recommendation

It is the consensus of the evaluation committee that the Weidenhammer solution is the option that best satisfies the requirements presented in RFP FHRPR2017-REV1 for Enterprise Finance, Human Resource and Payroll Software. The committee found that Weidenhammer's solution will provide the District with:

1. An integrated software solution that includes modules for Finance, Budget Management, Requisitioning, Purchasing, Accounts Payable, Fixed Assets, Human Resource management, Position Control, Position Budgeting, Payroll Processing, Portal systems, and optional document archiving functionality.
2. A secure socket layer (SSL) web-based platform with support for single sign on (SSO) and security roles to guarantee protection of personal identifiable information (PII) stored within the relational database (RDB) hosting the electronic records.
3. A modular software scheme to create workflow approval chains to automate business processes within the district that can allow our organization to move towards a paperless environment.
4. A data analytics tool to extract patterns, trends, and day-to-day metrics to empower the business decision making process in the District.
5. A proven software solution already in use in other school districts in the state of New Jersey which facilitates compliance with NJ reporting requirements.
6. A vendor with an established public school clientele that offers a viable procurement model.

The Evaluation Committee recommends that the Board of Education award the contract for a new Enterprise Finance, Human Resource and Payroll software to Weidenhammer Systems, Inc. of Wyomissing, PA.

Exhibit A - Recommended Proposal Payment Plan

North Hunterdon Voorhees Regional School District

Payment Plan

	Fiscal Year 2017-18	Fiscal Year 2018-19	Fiscal Year 2019-20	Fiscal Year 2020 & Beyond
Annual Subscription/ Support Fees - Alio Applications - Oracle Database - Alio Intelligence - Hosting	\$14,069 (Prorated)	\$33,765	\$33,765	\$33,765
Implementation Services (\$68,514/ 3 fiscal yrs) - Data Conversion - Training - Consulting - Implementation Management	\$22,838	\$22,838	\$22,838 or less - based on actual training hours	\$0
One-Time License Fees	\$18,311	\$0	\$0	\$0
Total Annual Investment	\$55,218	\$56,603	\$56,603	\$33,765

Notes:

- Cloud based hosting by Weidenhammer Systems, Inc., includes nightly backup, program updates and disaster recovery services