



June 4, 2018

Call for Expressions of Interest (EOI) for SEPTA's Human Resources Information System

Dear Sir/Madam:

Via this EOI process, The Southeastern Pennsylvania Transportation Authority ("SEPTA") is conducting an industry review to gain market insight with the goal of finalizing its Request for Proposal ("RFP") solicitation documents. In assembling the procurement documents for this project, SEPTA is seeking input from experienced candidates.

Anyone interested in participating must advise James V. Lemongelli via e-mail at jlemongelli@septa.org in order to receive any subsequent correspondence and follow-up documentation concerning this EOI.

SEPTA requests that interested parties submit an EOI response document in **hard copy** (One (1) original and Five (5) copies) containing a letter of interest, professional qualifications, experience in performing similar projects, project approach and related information regarding this Expression of Interest (EOI) **no later than the close-of-business (4:30 P.M.) on Thursday, July 12, 2018.**

A Pre-Submittal Meeting will be held on Thursday, June 14, 2018 at 10:00 AM, in SEPTA's Conference Room 11C, 1234 Market Street, Philadelphia, PA 19107. A representative of your company is encouraged to be present for the purpose of obtaining clarifications and discussing the EOI with representatives of SEPTA.

All questions (if any) pertaining to this EOI must be submitted in writing to James V. Lemongelli, via e-mail. **All questions must be received no later than the close-of-business (4:30 P.M.) on Thursday, June 21, 2018.** The answers to all questions submitted will be forwarded to all prospective proposers.

All correspondence concerning this EOI including e-mailed questions and hard copy EOI responses must be forwarded to:

Mr. James V. Lemongelli
Manager - Contracts
1234 Market Street, 11th Floor
Philadelphia, PA 19107-3708
Telephone: (215) 580-8330
jlemongelli@septa.org

BUILDING ACCESS: Please be advised that new security procedures have been implemented for access to SEPTA's 1234 Market Street building. All visitors are now required to sign-in at the front desk located in the lobby area and provide photo identification. Please allow adequate time when submitting procurement documents or when attending any public or private meeting in the building. This process will take approximately 15 to 30 minutes to complete. Thank you for your cooperation.

By participating in this EOI, the Proposer is unconditionally agreeing to the following: (i) SEPTA will be authorized to use any information submitted, referenced, or presented during this EOI, including, but not limited to, within SEPTA's final specification; (ii) SEPTA shall be authorized to reproduce, distribute, display, and create derivative works from any information received during this EOI; and (iii) SEPTA shall not be obligated to engage or otherwise compensate Proposer in any manner or for any reason for SEPTA's use of any information and/or material submitted by Proposer during this EOI, or information contained therein, or any other right granted hereunder.

Subsequent to the EOI submittal, SEPTA may contact interested parties to schedule individual meetings and/or demonstrations with staff at our headquarters in Philadelphia. As part of your submission, please indicate whether you would be providing a demonstration of the product in-person or remotely.

This effort should allow SEPTA to create a solicitation document which is realistic, economical and maximizes competition. When the review is complete, it is SEPTA's intent to solicit a Request for Proposal and then award a contract.

This letter must not be interpreted as an award of a contract or as a commitment to reimburse for any costs incurred in the preparation or participation of this EOI.

Overview

SEPTA is the sixth largest public transportation system in the country serving a population of 4.1 million in a service area covering about 2,200 square miles. SEPTA's Human Resource Information Systems (HRIS) manage more than 9,000 employees, including those in management and bargaining units. As the organization has grown, its HRIS has faced technological and design challenges related to the systems' existing user interface, integration capabilities, and data management. SEPTA's reliance on mainframe systems and manual, paper-based processes have created significant administrative costs upon the systems' users.

Objectives

SEPTA has prioritized the need to procure new Applicant Tracking, Performance Management, Organizational Chart, and Learning Management Systems in the organization's incremental approach to HRIS modernization with future procurement of other HRIS modules.

For the purposes of this EOI, SEPTA is interested in information related to vendors' products for Applicant Tracking, Performance Management, Organizational Chart, and Learning Management Systems. SEPTA invites interested vendors to respond with information regarding how their solutions could potentially address the business requirement categories outlined below. SEPTA is also interested in vendors' cost model and estimated pricing for their products, including vendors' ability to offer one or any combination of the four modules.

Applicant Tracking System

SEPTA currently uses AutoHire for applicant tracking which supports the main functions of the hiring process, including, but not limited to, posting positions, accepting applications, screening responses, and identifying qualified candidates. However, technological and design limitations related to the system's existing user interface, integration capabilities, and data management have created significant administrative strains upon the system's users, including recruiters and hiring managers, delaying the overall hiring process. SEPTA is interested in integrating the procured Applicant Tracking System software with the master data warehouse (Infor Lawson), job boards, social media networks, Microsoft Outlook, Tableau, and Testing database/systems.

Outlined below are high-level business requirement categories for the ATS.

Open User Account

- *Support User Accounts*
- *Secure User Access*
- *Offer Security Support*
- *Offer Training Support*

Develop Requisitions

- *Generate Requisitions*
- *Customize Recruitment Pipeline*

Post Jobs

- *Post Jobs*
- *Support Applicant Accounts*
- *Interface with Job Boards*
- *Interface with Social Media Networks*

Receive Job Applications

- *Generate Application Form*
- *Receive and Store Applicant Profiles and Applications*
- *Manage Referrals*
- *Manage Transfers*
- *Manage Workflow*

Screen and Score Applicants

- *Enable Pre-Screening, Searching, Filtering, and Ranking*
- *Display Status*
- *Provide Notification of Application Status*

Support Scheduling and Communication

- *Schedule Interviews*
- *Schedule Meetings*
- *Track Communication*
- *Provide Template Options*
- *Schedule Testing/CRC (Career Resource Connection)*
- *Provide Notifications*
- *Communicate Transfer Opportunities*

Manage Interviews

- *Capture Interview Scoring and Evaluation*

Support Hiring, Onboarding, and Feedback

- *Generate Paperwork for Applicants*
- *Generate Employment Offer*
- *Support New Employee Orientation*
- *Conduct Background Check*
- *Schedule Medical*
- *Alert Applicants to New Opportunities*

Analyze Data and Produce Reporting

- *Collect Data*
- *Analyze Data*

Performance Management System

SEPTA currently uses a paper-based process for managing employees' performance and goal setting activities on an annual basis. SEPTA is interested in procuring a Performance Management System that allows for annual and ad hoc performance reviews and that is seamlessly fed with extracts from the master data warehouse (Infor Lawson), Veritas, Training Management System, and Testing database/systems.

Outlined below are high-level business requirement categories for the Performance Management System.

Open User Account

- *Open Employee Accounts*
- *Open Manager Accounts*
- *Offer Security Support*
- *Monitor User Access*
- *Interface with Organizational Chart Software*

Set Goals and Evaluation Standards

- *Establish Goals*
- *Establish Evaluation Standards*
- *Establish Performance Evaluation Periods*

Evaluate Performance

- *Conduct Self-appraisal*
- *Perform Managerial Review*
- *Communicate Workflows and Evaluations*

Provide Coaching and Performance Diagnostic Tools

- *Offer Coaching Toolkit*
- *Interface with Learning Management System*
- *Interface with Training Management System*

Analyze Data and Produce Reporting

- Provide Global Evaluation Data
- Offer Data Inputs for Performance Evaluations
- Integrate with Data Warehouse

Organizational Chart System

SEPTA currently uses Insperity Org Plus 2012 to develop and update organizational charts on an as needed basis. SEPTA is interested in procuring an Organizational Chart System that can automatically generate organizational charts using data extracts from the master data warehouse (Infor Lawson).

Outlined below are high-level business requirement categories for the Org Chart System.

Manage User Accounts

- Establish and Monitor User Access
- Search Functionality
- Offer Security Support

Manage Organizational Chart

- Create Organizational Chart
- Update Organizational Chart
- Display Organizational Chart

Analyze Data and Produce Reporting

- Collect Data
- Analyze Data

Learning Management System

SEPTA currently uses Sphera Solutions' Compliance Suite, Training Management Software for which tracks instructor-led training for employees. SEPTA is interested in procuring a new Learning Management System that allows for learning, curriculum, certification and reporting capabilities and that is seamlessly fed with extracts from the master data warehouse (Infor Lawson), Veritas, the procured Performance Management System, and Testing database/systems.

Outlined below are high-level business requirement categories for the Learning Management System.

Open User Account

- Open Employee Accounts
- Open Instructor Accounts
- Offer Security Support
- Monitor User Access

Develop Training Plan

- Register for Courses
- Receive Course Notifications
- Interface with Performance Management System

Provide Training

- Manage Curriculum (Instructor-Led Training, Blended Learning, Synchronous Virtual Classroom, Asynchronous eLearning, On-the-Job Training)
- Manage Instructors
- Deliver Training
- Provide Instructor Tools

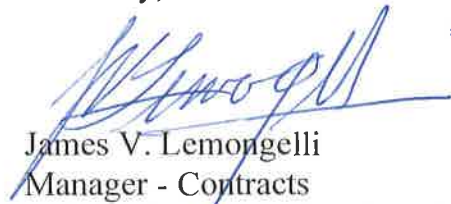
Log Training Records

- Log Employee Competency
- Manage Certifications
- Update Employee Transcript

Analyze Data and Produce Reporting

- Evaluate Course
- Record Employee Performance
- Provide Global Evaluation Data
- Provide Standard and Custom Reports

Sincerely,



James V. Lemongelli
Manager - Contracts
SEPTA Contract Administration
Professional & Technical Services