



## PROCUREMENT SERVICES

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### ADDENDUM No. 2

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REQUEST FOR PROPOSAL No.: 1220-030-2023-006

TITLE: WORKFORCE MANAGEMENT SOLUTION

ADDENDUM ISSUE DATE: November 15, 2023

REVISED CLOSING DATE AND TIME: ON OR BEFORE THE FOLLOWING DATE AND TIME (THE "CLOSING TIME"):

TIME: 3:00 P.M. (LOCAL TIME)

DATE: DECEMBER 6, 2023

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### INFORMATION FOR PROPONENTS

Proponents are advised that Addendum No. 2 to 1220-030-2023006 is hereby issued by the City. This addendum shall form part of the contract documents and is to be read, interpreted and coordinated with all other parts. The following information is provided to answer questions raised by Proponents for the above-named project, to the extent referenced and shall become a part thereof. No consideration will be allowed for extras due to the Proponents or any sub-contractor not being familiar with this addendum. This Addendum No. 2 contains five (5) pages.

#### **REVISED CLOSING TIME:**

Delete Section 2.1 in its entirety and substitute with Section 2.1 below:

#### **2.1 Closing Time and Address for Proposal Delivery**

The Proponent should submit the Proposal **electronically** which must be delivered by email at: [purchasing@surrey.ca](mailto:purchasing@surrey.ca)

**on or before the following date and time**

**Time: 3:00 p.m., local time**

**Date: December 6, 2023**

**(the "Closing Time").**

Confirmation of receipt of email will be issued. Proposals that cannot be opened or viewed may be rejected. A Proponent bears all risk that the City's receiving computer equipment functions properly so that the Proposal is received by the Closing Time.

**Note:** The maximum file size the City can receive is 10Mb. If sending large email attachments, Proponents should phone [604-590-7274] to confirm receipt.

**QUESTIONS AND ANSWERS:**

**Q1.** Within Schedule C-3-1 excel file the Functional Requirements tab does not have a 'Comments' column. Is this intentional or are comments desired?

**A1.** Comments are desired. Please add a comments column or see updated Schedule C-3-1.

**Q2.** Please confirm City of Surrey only has two unions / other pay agreements, CUPE & Library CUPE.

**A2.** The City of Surrey has two unions represented for this initiative, CUPE and Library CUPE, alongside exempt and non-union staff groups.

**Q3.** How many different pay frequencies are in scope? (Monthly, Bi-weekly, Weekly etc.)

**A3.** Currently only bi-weekly.

**Q4.** The RFP mentions 4 different areas of employees - CUPE, Library CUPE, Exempt and Non-Union. Do these areas share the same pay/leave rules? (Salary, Hourly, PT, Contract, Temp etc.). If not, how many different groups do you have?

**A4.** The extent to which these categories share rules may vary. Additionally, within specific groups, there may be different agreements in place; for example, Lifeguards may have distinct agreements compared to early childhood educators.

The City utilizes approximately 30 workgroups within PeopleSoft Time & Labour to manage these various employee categories.

**Q5.** How many leave banks do you track? (Vacation, sick etc.)

**A5.** There are numerous pay categories for managing leave balances, aside from those mentioned, there are several other categories accruing entitlements from which staff can draw balances.

Specifically, there are 8 types of leave plans used for these employee groups in PeopleSoft Base Benefits, with variations based on the employee type. Additionally, there are 5 compensatory time off plans.

**Q6.** How many variations of each leave bank do you have? (IE - 3 unique Vacation plans)

**A6.** The number of variations for each leave bank is as follows:

**Leave Plans:**

- Sick: 15 variations
- Sick Gratuity: 1 variation
- Vacation: 17 variations (with an additional 3 unique vacation plans)
- Supplementary Vacation: 10 variations
- Stat Holiday: 7 variations

**Compensatory Time off Plans:**

- Flex bank

- Earned time bank.
- Overtime bank (multiple plans)
- Standby bank

**Q7.** How many pay rules do you have (Daily OT, shift Diff, Weekly OT) and how many are unique to your company's business rules?

**A7.** There are 38 PeopleSoft Time and Labour rule programs used for the above employee groups, using 50 unique rules in different combinations..

**Q8.** Integrations: Besides importing HR data and exporting Payroll data, are there any other integration needs? Please list any additional exports/imports above and beyond.

**A8.** Detailed integration needs are outlined in the RFP within the Scope of Services and are further described in the functional (Theme > Integration) and technical (Category > Integration) requirements spreadsheet tabs.

**Q9.** What languages are in scope?

**A9.** English

**Q10.** Please list the countries and Provinces/States where the employees reside.

**A10.** British Columbia, Canada.

**Q11.** Will you require the time and attendance system to calculate gross pay, or to pass the time details to Payroll for that calculation?

**A11.** Time and labour rules are currently processed in PeopleSoft HCM prior to payroll processing. However, the City is open to exploring options to further enhance this functionality.

**Q12.** Do you manage long term absences in your HR system (such as Maternity leave)? If not, would you want to manage them inside of the new application?

**A12.** While the HR platform (PeopleSoft HCM) currently serves as the system of record for long-term absences, the City is interested in assessing the new platform's capabilities for supporting such cases.

**Q13.** Do you wish to track occurrences of unexcused lateness and / or absence? If so, please describe the requirements for generation of attendance points..

**A13.** The City requires the ability to report on lateness and absence data. However, performance management, including the generation of attendance points, is currently managed through PeopleSoft HCM. The City is open to exploring potential options in partnership with the selected proponent.

**Q14.** Do you have rules for rounding and gracing?

**A14.** Yes, there are rounding rules in place (rounding out to quarter hour increments). However, the meaning of "gracing" is not entirely clear.

**Q15.** The RFP mentions you would like to track cost center and work orders, are these dependent on each other? Are there any other details you would like to track?

**A15.** Cost centres and work orders are not necessarily dependent on each other. The City is interested in working with the proponent to determine additional details that can be tracked in the future.

**Q16.** How many employees will require the on-call scheduling vs the exception-based scheduling?

**A16.** As specified in the RFP, approximately 85% operational-based scheduling and 15% exception-based scheduling.

**Q17.** Who is the system of record for the qualifications for scheduling? Will an integration be required to send those qualifications into the new system?

**Q17.** The system of record for employee qualifications related to job specification is currently PeopleSoft HCM. Integration will be necessary to transfer this data into the new WFM system. The City expects that the new WFM solution can also incorporate skills-based data for scheduling purposes. The final decision on the system of record for skills information will depend on the chosen proponent's guidance.

**Q18.** Do you have averaging schedules, such as 9/80?

**A18.** Yes, averaging schedules like 9/80 are in use.

**Q19.** How would actual work time need to be captured and who will be entering it (employees/timekeepers)? Please indicate which methods of data collection will be used, and any variances between work groups.

**A19.** The method for capturing worked time varies depending on the work group. In some cases, the schedule is updated by a scheduler, and the time-worked actual is what remains at the pay period end. This requires no intervention from the staff member. However, for exception-based workers, an online timesheet is used, which employees fill out and timekeepers validate and post. The combination of timekeeper and employee data entry depends on the work area and types of time reporters used.

The data collection methods include:

- Workforce Terminals (new time clocks): No
- Mobile devices (smart phones and tablets): Yes, accessing WFM through a mobile browser or app.
- Web Clock (browser-based clock): No
- Online timesheet: Yes

**Q20.** How many different jobs can employees be scheduled to?

**A20.** While there is no strict limit, most employees have only one job. However, some employees with multiple jobs may have an average of two.

**Q21.** How many different patterns of shifts are employees schedule to?

**A21.** The number of shift patterns varies depending on the specific staff group being implemented. There are currently various shift patterns in use across different City employees.

**Q22.** How many employees work concurrent jobs? Please list number of employees per employee group

**A22.** If by "concurrent jobs" you refer to employees working multiple jobs within the same period, the answer is yes. If you mean employees working multiple jobs at the same time, this might be a potential need in the future.

**Q23.** Please describe the reasoning behind rolling out the system in 2 Phases instead of 1.

**A23.** The decision to roll out the system in multiple phases is driven by several factors, including risk reduction, reduced complexity, and the ability to prioritize different business areas without having to wait for the entire city-wide implementation.

- Q24.** Requirement 1009 “Ability to define relative weighting to each role in a shift”. We would like to have a better understanding of how the City is weighting the role. Where is the info coming from? How is the weighting being determined?
- A24.** Currently, this information is not stored in any system and the weighting is only determined manually by the scheduler. Here is a scenario that this requirement would seek to solve: a lifeguard has called in sick for their scheduled shift and the scheduler needs to fill this vacancy. There is no hard rule that says this staff member needs to be a head lifeguard, however head lifeguards would be given preference in being offered this vacancy over assistant lifeguards.
- Q25.** Requirement 1106 “Ability to connect to the City’s wide Safety Call system”. Would the City please clarify this requirement and the role that you envision a WFM system would have?
- A25.** Certain business areas within the City use a system called OK Alone, to ensure the safety of staff who are working alone. The staff call a phone number at the beginning of their shift, and are required to call in at scheduled intervals as a positive verification that they are safe. If they do not, OK Alone will alert help for the staff member. With this non-mandatory RFP requirement, the City would like to see what options that the WFM solution would have to know a staff member is working alone, and connect with the OK Alone platform.

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All Addenda will become part of the Contract Documents.

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- END OF ADDENDUM -