



City of Pembroke Pines ERP Software Demonstration Script

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Demo Script Scoring Details

Name: _____

Role or Title: _____

Department: _____

Dates of Demo: _____

Vendor: _____

Functional Score: how well the software meets the defined functional requirement.

4 = **EXCELLENT**; Functionality exceeds the expectations and provides productivity opportunities not previously considered.

3 = **SATISFACTORY**; Functionality meets the requirement.

2 = **UNSATISFACTORY**; Functionality was shown, but only partially meets the requirement.

1 = **NOT SHOWN**; Functionality was not demonstrated/ does not work or cannot be done in system.

Usability Score: how easy or cumbersome it is to accomplish functionality.

4 = **HIGH EASE OF USE**; Functionality is able to be achieved in a manner more effective and efficient than done today.

3 = **USABLE**; Functionality is able to be achieved in a manner that is comparable to today, in terms of effectiveness and efficiency.

2 = **LOW EASE OF USE**; Functionality is able to be achieved, but the system process was cumbersome or slow.

1 = **NOT SHOWN**; Functionality was not demonstrated/ very difficult to use



Section 1: System Introduction / Cross Functional

Role Center / Homepage

The purpose of this section is to demonstrate to The City of Pembroke Pines the user experience from a high-level point of view. This section is designed to provide an overall view of the product, navigation between modules, etc. Certain cross-functional requirements have been called out specifically for demonstration in addition to the overview of the product.

User Interface & Navigation

The purpose of this section is to demonstrate the overall navigation of the product, switching between modules, and the different tools and options available to different role centers (e.g. executive vs end user) to aid in navigation.

Demonstrate the ability to personalize/simplify user experience at the individual, role, team, enterprise levels as well as limitation of user access by role. This would mean silos of accessible information across functions, finance and HR files are always set with restricted permissions. For example, removing fields or showing different fields based on user role.

Demonstrate the re-labeling of fields, creating or modifying 'hot buttons'. For example, for an accounts payable manager, demonstrate how the user interface could be personalized.

Demonstrate two user profiles with different permissions viewing the same content (i.e. how the view would differ between an Associate/Project Coordinator and Director from another division approving a transaction within the system).

Dashboards

The purpose of this section is to show in the system how to create a personalized dashboard configuration (Role based dashboard based on an Executive view, Project Coordinator view and Accountant view).

For this example, from a facilities manager perspective, please show a role center / homepage as the center of daily activities. The role center should include:

- A summary level dashboard.
- Key Performance Indicators (KPIs) that are critical to a manager role.
- Graphs and summary level data relating to facilities maintenance, expenses, relevant data with drill down capability.

Show one or two different formats a dashboard can be configured based on user preference.

Demonstrate how a manager may rely on the system to help prioritize daily activities and be most efficient in decision making. Show the following functionality:

- Calendar and email integration.
- Setup and assignment of tasks and work orders to an individual or group through a work queue.
- Show how a user can update tasks and work orders by adding notes or special instructions.



- View status of tasks or work orders (open, outsources, closed-out by month, age, status)
- Show the system's ability to perform full text, global search, and a wildcard search.

Workflow

Demonstrate how web-based electronic forms processing provides initiation, conditional routing, tracking, review, and approvals as dictated by the workflow design.

- Demonstrate how to set up the workflow to electronically route a form to appropriate personnel supervisor, reviewer, approver). Include the conditional routing based upon originating department.
- Show how the originator can add an additional approver when they initiate the form.
- Show how a reviewer is notified that a form is available to be reviewed.
- Show how an approver may loop in a reviewer that is outside of the approval chain.
- Demonstrate a concurrent approval process.

The Approver receives the form and determines there is not enough information to approve the request.

- Show how an approver can reject a request and send the form back to the originator requesting additional information.
- Demonstrate how the originator can update the form with the requested information and resubmit.
- Show how the originator can track the status and progress of the request and receives Check-in & Check-out with version control, history, and audit trail capabilities.
- notification upon completion of the request.

Security and Permissions

The City of Pembroke Pines requires a system that provides maximum access to information while minimizing the risk of inappropriate inquiry, deletion, updating or entry of data.

- Demonstrate the ability to restrict access based on user-defined security: i.e., the position of the user, by organization structure, by cost center/responsibility center, at the field, screen and menu level also search level.
- Show how security can limit or deny a user with view and update access to a record.
- Show how a user may add/enter data but not retrieve that same data for example an intake clerk.
- Show how a user can delegate security privileges to another employee for a specified time period.
- Demonstrate how the system maintains an audit trail for transactions.
- Demonstrate security alerts and reports.



Reports and Queries

Demonstrate the ability to generate reports on an “as-needed” basis representing a query not part of the regular, “routine” reporting specifications. Produce a report comparing budgeted dollars and actual expenditures from all sources for all departments. The report should contain the actual budget expenses from the beginning of the fiscal year for each department showing expense code items and dollar amounts sorted by expense code.

- Demonstrate the ability to enter necessary selection criteria to create the report.
- Show how to view the report, save the report for future reference, and save the inquiry for future re run.
- Demonstrate the ability to send the report to a group of individuals over email to review.
- Show a standard preconfigured report that applies to finance.
- Show how a user can customize this standard report.
- Show how data be imported an exported as an EXCEL file, as a CSV file.

Document Management

Show your system’s document management functionality as follows:

- Search functionality, text search, full page OCR, global search capabilities
 - Does OCR occur on document ingestion or on the fly during searches?
 - What file types are OCR’d?
 - Define your search limitations. Is it limited to a date range, file type, user privileges, document count, etc.
 - What is returned when a user’s search includes items they don’t have privileges to view? Will the search return privileged documents’ headers-only or no results?
- Uploading and attaching documents to employee file, vendor file, etc.
 - Drag and drop.
 - Auto filling of keywords. Example: enter an employee id would auto fill name & DOB.
- Document indexing, cross-referencing, notes and tagging capabilities.
- Custom defined queries.
- Multi-level User, Group and Role security permissions.
- Use of security words to set permissions at a document level.



Section 1: System Introduction / Cross Functional Scoring

	Functionality	Usability
Overall		
Role Center / Homepage		
User Interface and Navigation		
Dashboards		
Workflow		
Security and Permissions		
Reports and Queries		
Document Management		

What did you like most?

What did you like least?



Section 2: Finance and Accounting

The City of Pembroke Pines Finance Department provides services to the public, internal support and services to all City Departments and Offices.

Accounting Structure

The accounting structure is organized based on funds or account groups. A fund is defined as a separate, self-balancing set of accounts which is segregated for the purpose of accounting for specific activities or certain objectives.

Demonstrate the setup of a fund-based accounting structure using:

- Governmental Funds
 - General Fund
 - Capital Projects Fund
 - Debt Service Fund
 - Other Nonmajor Funds, such as Road & Bridge, Schools, etc.
- Fiduciary Funds
 - General Pension Trust Fund
 - Fire & Police Pension Trust Fund
 - Other Post Employment Trust Fund
- Proprietary Funds
 - Internal Service Fund
 - Enterprise Fund

General Ledger/Chart of Accounts

The Chart of Accounts design and system should support the ability to assign unique user-created and defined attributes to account codes, orders, and revenue and expense transactions to support departmental accounting and management information needs.

Demonstrate the structure of your system's GL and Chart of Accounts.

Demonstrate the multiple types of Journal Entries

- Regular
- Reversing
- Recurring
- Governmental Accounting Standard Board (GASB) entries
- Allocations (equal increments or by percent)
- System import or upload
- Attachment
- Approval Workflow (JE requires two approvals at the minimum and Budget Adjustments requires at the minimum 4 approvers).



Journal Entry Processing

- Upload a journal entry in the current GL period (using Excel worksheet or other standard file formats - .txt, .csv) with total debits and total credits equaling \$20,000.
- Enter a journal entry in a future GL period with total debits and total credits equaling \$25,000.
- Enter a journal entry in the current GL period that is unbalanced.
- For the journal entry that is unbalanced, show your software's capabilities for providing error identification and correction before posting occurs, including exception reporting/notification to user.
- Enter a journal in the current GL period with total debits and total credits being \$30,000 using multiple companies (funds). Insure that the journal entry is out of balance by company (fund). The entire journal, however, is in balance.
- Review journal entry that was out of balance by company (fund) and review the creation of the inter-fund journal lines.
- Run a journal entry report to view output of posted journals.
- Using an accounting rule, demonstrate how your software will generate distributions (allocations) of an amount to different account structures in various funds in the general ledger.
- Demonstrate drill down capability from ledger to checks to Invoice to Purchase Order to requisition to contract to bids (if applicable) and back.
- Demonstrate how to change accrual effective date and generate the appropriate journal entries without having to delete and re-enter the invoice.

Inter-Fund Accounting

- Demonstrate system capability to transfer funds between departments, funds, and projects through an automatic fund balancing. An authorized user should be allowed to complete entries across multiple funds with balancing entries prepared in the background.
- Fund accounting with automatic inter-fund balancing entries; at minimum generate error message if out of balance.

Financial Controls

Demonstrate system functionality that supports compliance and adherence:

- Show how segregation of duties protocols work to allow approvals and permissions in specific transactions.
- Demonstrate how the system prevents transactions or provides alerts when logic or rules are violated.



Fiscal Year-end or Period-end Processing

Demonstrate closing GL Accounting Period

- Run reports for month-end close (transaction registers, journals, trial balances, balance sheets, income statements, etc.)
- Close current period.
- Try to enter a journal for closed period.
- Open the next period.
- Adjusting Journal Entries for Year End.

Demonstrate the start of processing against any period in the new fiscal year prior to close of last fiscal year. Retroactive transactions are allowed.

Demonstrate how processing for the two fiscal years can occur simultaneously, such that balances in year 1 have been changed for accruals and other adjustments, while the processing of revenues and expenditures can occur for year 2.

Effective Dating

- Demonstrate the processing of retroactive transactions within a month and a fiscal year and, at times, into a prior/"closed" month or fiscal year. These transactions would affect both the cash and fund balances of an account.
- Assume that a prior year error of \$500 has been discovered in the current year. Demonstrate the \$500 error being corrected as a prior period adjustment of the beginning balances.

On-line and Other Inquiries:

- Inquire on Account Balances on-line and drill down to source (e.g., payables, payroll sub-ledgers)
- Show general fund actual versus budget for account balances.
- Show available funds (budget minus commitments minus encumbrances minus expenditures) by account structure and budget control account group.
- Show how to export data/report to excel to track expenses by GL, vendor, project, etc.
- Demonstrate the creation of the CAFR Book.
- Demonstrate how to compare live information from check payments, wires, ACH to and from the City to the bank statements and reconcile to the bank.
- Demonstrate the ability to forecast cash flow analysis and automate alerts and notification for insufficient balance in the account.
- Demonstrate audit trail capability



Fixed Assets

Demonstrate your system's capabilities related to the financial treatment of assets. Demonstrate how to set up a fixed asset. Explain the capabilities and options for asset numbering (automatic or manual assignment). Show how the fixed asset is tracked. Show the types of depreciation schedules that can be defined and applied to an asset in the system. Demonstrate how a user will view tracked depreciation on a fixed asset and how notifications can be automated at a certain value.

Demonstrate the following for Fixed Assets:

- Capitalize an asset.
- Reclass, transfer and dispose of an asset.
- Show how depreciation entries are reported in financial reports.
- Create a depreciation forecast.
- Show how to set up and maintain fixed asset information by location, including serial number, insurance, value, etc.
- Assign a GL account to a fixed asset.
- Categorize individual fixed assets into asset classes and integrate to financial reporting for the balance sheet.

Demonstrate ability to enter and track fixed asset information from ledger to invoice to PO to requisition to contract to bids (if applicable) and back

Demonstrate functionality to manage a fleet of vehicles for the city:

- Setting up the new asset with the ability to add pictures, VIN/Serial Numbers, Vehicle Titles and other relevant backup when vehicles or assets are delivered to the City.
- Show how to re-assign/transfer vehicles from one department to another and the workflow process for approvals of the transfer, along with the ability to track the history of when vehicles/assets have been transferred and from which departments.
- Demonstrate establish a vehicle Category (Car, Truck, Tractor, Motorcycle, etc.)
- Demonstrate how data can be tracked on the original coding on where the vehicle was expensed along with the account coding on where maintenance would be charged to, depending on the department the vehicle was transferred to.
- Demonstrate the ability to change the vehicle status to Surpluses/Pending Disposal or to Disposed.
- Demonstrate the ability for the Departments to view information and request changes, that would go through a workflow approval process, such as changing responsible party/driver information, asset location, etc.



Account Receivables

Demonstrate the following functionality for handling accounts receivables:

- Capture credit card or point of sales in the system or integrate third party credit card merchant services.
- Assign parent-child relationships/multi-tier accounts under one customer account. For instance, Broward County and the State of Florida have multiple departments with different addresses where we bill them separately for different services that the City provided.
- Generation of statements, past due statements, and adhoc invoices (ability to export to Excel).
- Storing receivable invoices via a document repository.
- Show various methods of receivable invoice delivery, for example, print and mail, and print and email or email only.
- Show how to attach backup to the bill for the customer.
- Show how to mark invoices that were sent to collection or put invoices on hold.
- Show credit functionality, credit memo, transfer from one customer to another customer without having to void invoice, create barcode on invoices, etc.
- Demonstrate audit trail of activities and capabilities.
- Demonstrate processing of NSF returned checks.

Budgeting and Forecasting

Discuss how a budget and various structures can be established when beginning the budget preparation process. Walk through how the budget calendar is defined and how budget accounts are established such as a separate chart of accounts or can be shared with the GL chart of accounts. Include in your demonstration:

- Show how budget data can be uploaded from excel or exported to excel.
- Demonstrate the process for creating a budget version from another version, or a new budget from another.
- Show workflow functionality along with alerts and notifications when budget submissions are due, approval is required, budget is approved, submission is pending approval, etc.
- Show how a user can create a budget and forecast scenario using actual vs. budget data.
- Demonstrate the ability to create, track and manipulate multiple versions of the budget (Recommended, Approved, Adopted, Amended).
- Demonstrate how workflow is used to automate the approval process.
- Show how funds control work (total expense exceeds budget) and how the system will notify the staff.
- Demonstrate user and cost center management
- Demonstrate the forecasting of personnel budget based on union contracts
- Demonstrate the creation of the Budget Book
- Demonstrate the creation of user defined fields and categories
- Demonstrate the inputting of Departmental goals and performance measures.
- Demonstrate the entering of a personnel revision
- Demonstrate reports displaying position counts and current year changes
- Demonstrate how to configure certain ranges of accounts equaling another account



- Demonstrate how to calculate a line item based off another line item
- Demonstrate how to calculate a line item based off a globally determined number
- Show how back-up to prior year budget can be stored and retrieved
- Show how prior year request can be used as request for new year.
- Show how to store and report on budgetary historical.

Accounts Payable

The Department performs invoice processing/paying function in the Requisition-Purchase Order-Payment cycle. Sufficient controls are inherent in the process to maintain and promote effectiveness.

- Demonstrate how vendor is set up includes vendor form, W-9 form, 1099 setup, terms, type of service, and discounts. Also include instate, out of state, and out of country vendors.
- Demonstrate how to set up a vendor that has multiple payment locations, for example, Broward County or the State of Florida has multiple departments with multiple addresses for payments.
- Demonstrate the ability to link a vendor to a bid and/or contract
- Demonstrate how requisition works, including the approval process, and how Purchase order is created.
 - System automatically converts a Requisition to a PO after it has been fully approved and automatically sends e-mail it to the vendor, requester, and/or any other staff members, if desired.
- Demonstrate the ability to receive invoices electronically (via upload and email).
- Demonstrate the ability to upload/attach scan images/backup via OCR functionality.
- Demonstrate the ability to hold invoices for future approval and payments
- Demonstrate the ability to upload invoice, vendor information, GL codes, amount, etc. via a text file.
- Demonstrate the ability to increase/decrease PO amount, add/delete lines in a PO, changing the GL codes on a PO, and closing the PO.
- Demonstrate the ability to process an invoice against a 2-way match purchase order. (PO to Invoice)
- Demonstrate the ability to process an invoice against a 3-way match purchase order (PO to Receipt to Invoice) where the:
 - Vendor to pay is different than the vendor on the purchase order with the proper controls or approval process.
 - Quantity invoiced is more than received or less than received.
 - Invoice unit price is greater than purchase order unit price exceeding tolerance.
 - Vendor to pay is a 1099 vendor but the invoice is not subject to 1099 reporting.
 - Vendor is offering a discount that is not on the vendor record or purchase order.
- Demonstrate the process of approving and releasing invoices.
- Demonstrate the capability to enter and save invoices as incomplete.



- Payment Functionality: Demonstrate the process of generating payments via:
 - Checks
 - Immediate (emergency) on-demand payments
 - Scheduled to pay in the future
 - Recurring
 - Electronic Funds Transfer
 - Wire Transfers
- Demonstrate the process of generating positive pay file.

Reporting and Consolidation

Demonstrate the following:

- Run a trial balance - detail report by fund (entity) with the ability to export into Excel
- Run a balance sheet report by fund (entity)
- Run an income statement (statement of revenues, expenditures, and changes in fund balance) report by fund (entity), by division (department), and by project (site).
- Run a YTD transaction register - detail report by fund (entity), by division (department), and by project (site).
- Demonstrate the consolidation mapping process (i.e., roll-up of funds) and run a consolidated trial balance, balance sheet, and income statement for all Funds (entity wide statement)
- Demonstrate the parent/child account relationship mapping process (i.e., roll-up of accounts) and produce a balance sheet and income statement using the defined parent/child relationship roll-ups.
- Demonstrate the ability to run a "Paid Invoice Query" for various fields, such as coding for a specified time frame, or invoices paid to a specific vendor during a time frame.
- Demonstrate the ability to run an "Open PO Report" for various fields, as vendor name, or coding.

Other reports:

- Generate 1099 and report to IRS electronically
- Journal Entries report
- Budget adjustment report
- Vendor List report
- Vendor information report
- Accounts payable report
- Check register/payment report
- Invoice detail report
- Invoice report check for returned check
- Possible duplicate invoice report based on similar invoice number, date, amount, and vendor
- Account balance report, etc.



	Functionality	Usability
Overall		
Accounting Structure		
General/Ledger/Chart of Accounts		
Journal Entry Processing		
Inter-Fund Accounting		
Financial Controls		
Fiscal Year End or Period End Processing		
Effective Dating		
On-line and Other Inquiries		
Fixed Assets		
Accounts Receivable		
Budgeting and Forecasting		
Accounts Payable		
Reporting and Consolidation		

What did you like most?



What did you like least?



Section 3: Public Services (Engineering, Facilities Maintenance & Utilities)

The purpose of this section is to demonstrate to the employees of the City of Pembroke Pines certain elements and functionality to associated with public service activities which include elements of engineering, facilities maintenance and utilities. Show the following functionality for each designated area:

Engineering

Show functionality that allows a city employee within the engineering division to manage construction projects (from a project management office (PMO) perspective).

- Demonstrate the ability of vendors to submit project documentation (i.e. project plans and associated supporting documents or photos) and bids through a vendor portal for city employee review.
- Show how these plans can be pushed through multiple levels of approval.
- Demonstrate how the system can electronically generate appropriate permitting (with consistent numbering) for a selected vendor once plans have been approved.
- Take us through the ability to remit payment to a selected vendor for work performed.
- Show how project archives are maintained within the system and how a city employee would access them.
- Contract Payments: Show the functionality necessary to execute contract payments to vendors.
- Demonstrate the ability to electronically remit payment to vendors and reconcile payments to vendor invoices.

Construction Project Management

Demonstrate functionality for construction project management and construction estimating capabilities.

Estimates and Quotes

- Show the ability to create an estimate.
- Show how the estimate can be converted to a quote.
- Show how the estimate/quote can convert to a project.



Project Set-up and Management

Demonstrate functionality to create and manage projects:

- Demonstrate how documents or specifications can be uploaded/attached to a project.
- Demonstrate how a change order can be uploaded to the project and project is modified with new price, specifications or requirements.
- Demonstrate how to enter and track time on a project by individual, contractor or group.
- Demonstrate how to track labor costs and adherence to the project budget.

Reporting

- Demonstrate project tracking and reporting capabilities showing project dashboards & metrics, drill down and summary level capabilities.
- Demonstrate reporting functionality, financials, plan to actual, etc.

Facilities Maintenance

Demonstrate the functionality surrounding facilities maintenance. Show how city employees will issue and manage work orders, service requests and maintenance requests. Demonstrate how data pertaining to work orders and maintenance can be captured and leveraged (i.e. historical job estimate and plan comparisons as well as warranties on previous work completed).

Work Order Management

Demonstrate the functionality necessary to issue and manage work orders. Show how a city employee would issue a work order/service/maintenance request within the system and track the progress of the issued order. Demonstrate how a city employee can capture and track the budget, costs, assigned staff or contractor and schedule of an issued work order/service/maintenance request and warranty information.

- Demonstrate the ability of the system to electronically push work order/service/maintenance requests to city employees or contractors.
- Show how city employees or contractors can interface with the system (with the use of a portal and mobile functionality i.e. smartphone/tablet) to update progress of a work order/service/maintenance requests or mark the project as complete.
- Demonstrate how the system will generate alerts to city employees that the work order/service/maintenance request is complete and when warranty dates on completed work orders will expire.



Work Order Reporting

Demonstrate the functionality necessary to research work orders/service/maintenance requests and generate reporting on both current and historical data. Show how a city employee would be able to pull data to compare metrics from similar type orders to ensure equitable pricing for the city when contractors are involved.

- Demonstrate how to generate reporting and configure dashboards relating to current and past work order/service/maintenance requests. Please include data relating to budget, labor and material costs, work order type, employee or contractor type and equipment type.
- Show how the system will generate reporting on specific KPI data points consisting of the following:
 - No read reports (i.e. meters that are unreadable).
 - Meter repair reports (i.e. meters that are functioning but need repairs).
 - Exception reports (i.e. meters that are functioning within a given threshold and will not be scheduled for repair).
 - Rollover report (i.e. month by month read outs of meters that perform consistently lower than the previous month).
 - Account Activity reports (metered accounts that are current, delinquent, or have had a lien placed against them).

Utilities

The purpose of this section is to take us through the functionality surrounding a city employees' ability to manage utility workflows within the system. Show the group how to manage initiation/set up of new accounts for customers. Demonstrate how a city employee would disconnect or reconnect utility services based on changes to an existing account or delinquent payment status. Show how a city employee would handle a work order process and how field personnel can utilize mobile capability to complete their tasks (i.e. meter reading). Demonstrate the functionality surrounding the billing and receipt of payments for utilities.

Account Set Up

Take us through the functionality that will allow a city employee to set up new utility accounts within the system and/or transfer accounts to existing account holders. Show how a customer would access their account through a portal, kiosk, etc. to manage information, payments, or other aspects of their account.

- Demonstrate the ability for a customer to access a portal to set up a new account. Show the self-serve functionality a customer has access to and how that functionality can push alerts and work orders to a city employee (Ex; report an outage online).
- Show how the system will automatically generate a service request to be fulfilled for a new account holder.
- Show how a city employee would use the system to perform a credit check on new customers prior to authorizing the new account set up (Ex; deposit requirement for new accounts).



- Demonstrate how the system will push notifications to new account holders regarding their account activation, payment status, billing start and end dates, etc.
- Show how a city employee can manage user access to an account (i.e. transferring the account into another account holders name and implementing permissions based on those changes).

Work Orders

Demonstrate the functionality that will allow a city employee to disconnect and reconnect utility services to customers in the event there is a delinquent payment, or an account is resolved. Show how field service personnel can utilize mobile capabilities of the system to perform basic workflows and tasks associated with service disconnection or reconnection and to perform basic data collection such as meter reading. Demonstrate system mobility and offline capabilities as it pertains to capturing portions of workflows during different stages and how that data synchs to the system when connectivity is established.

- Show the system's ability to generate notifications (i.e. through the system app, e-mail, etc.) to field personnel to either shut off or turn on service at a customer location (i.e. delinquent payments with no resolution, delinquent payments received, account deactivation due to property vacancy or new account set up).
- Show how the system can assign work orders/service requests to specific field personnel based on location of the request or availability of the field personnel (e.g. replacement of a meter cover).
- Demonstrate mobile capability for field personnel. Show how notifications from the system can be received via smartphone/tablet to initiate service or shut service off.
- Show how field service personnel can input data into the system in the field (i.e. meter read outs or notifications to verify tasks have been completed).
- Demonstrate the system's ability to operate without internet connectivity (i.e. completion of field personnel workflow notification and then notification sent when smartphone/tablet resynchs with internet connectivity).

Billing and Payment Receipt

Demonstrate the functionality that will allow a city employee to manage billing and payments for customers within the system.

- Demonstrate the system's ability to calculate, generate, and track regular and multi- tiered billing fees and pricing adjustments (Ex; reconnect fees or late payment fees).
- Show how the system can handle multi-tiered pricing structures (Ex: use of 0-10,000 gallons of water captured at x price, 10,001-20,000 gallons of water captured at x price).
- Show how the system can generate and automatically send utility bills to customers and reconcile payment receipts from customers with the corresponding account.
- Demonstrate the systems capability to support multiple payment methods (i.e. credit card, check draft, etc.).



- Demonstrate the ability of the system to generate notifications when accounts become delinquent (30,60,90 days). Show how the system will push notifications to customers regarding delinquent payments and utility disconnection.

Backflow

Demonstrate the functionality that will allow a city employee to manage backflow activities associated with monitoring and testing meters in both a residential and commercial setting. Show how field service personnel can utilize mobile capabilities of the system to perform basic workflows and tasks associated with testing and certifying meter results.

- Show the system's ability to generate notifications to city employees when "dual check valves" need to be tested (i.e. these valves need to be checked on a 10-year period basis).
- Demonstrate how the system can manage meter locations (both residential and commercial) and track when the meter was installed, tested last, when the next test due date is and if the meter still holds a certification for being tested successfully.
- Show how the system can assign work orders/service requests to specific field personnel based on location of the request or availability of the field personnel (Ex; replacement of a meter cover).
- Demonstrate mobile capability for field personnel. Show how notifications from the system can be received via smartphone/tablet to initiate service or shut service off.
- Show how field service personnel can input data into the system in the field (i.e. meter read outs or notifications to verify tasks have been completed).

Geographic Information System (GIS) Integration

Provide the ability to map all utilities, utility components (valves, stations, hydrants, etc.) and key operational features (flows, pressures, analytical data, etc.)

- Provide quick and easy access to critical operational information and status
- Improve decision making and response time to emergencies through immediate access to system parameters
- Allow for better regulatory compliance and knowledge of system dynamic changes that could result in failures

Supervisory Control and Data Acquisition (SCADA): will result in significant improvements in SCADA data acquisition, ability to assess conditions, make determinations and decisions and implement solutions as necessary from various locations.

- Receive system data and alarms real-time.
- Quickly locate areas in need of attention/repair.
- Ability to determine manpower and equipment needs quickly during emergencies.
- Adds the ability for remote control of components from different locations citywide.



Cross-Connection Control

Demonstrate functionality that provides the ability to identify all approved cross-connection control devices in the city.

- Required testing of cross-connection control devices (backflow preventers) can be monitored/tracked.
- Data and required information on cross-connection control devices can be accurately collected and easily provided to the relevant regulatory authorities.
- Will assist in the documentation of notices sent and responses received from customers.
- Ability to send notification to restrict service to units who are non-compliant or in conjunction with AMI service automatically send notices and restrict service.

Interconnects

The City shares drinking water line interconnects with neighboring cities at various locations.

- Identify each interconnect.
- Track usage data and generate notifications for regulatory use.

Asset Management

The Utilities Department has a significant amount of assets that always need to be accounted for.

- Allow for an integrated tracking system where items are tracked “cradle to grave” and relevant departments are notified automatically of status changes.
- When items reached required maintenance schedules or approach end of useful life status, reports and notifications are automatically sent

Purchase Order/Invoice/Project Tracking

The Utilities Department procures numerous projects every year.

- Allow for the monitoring of the procurement, award, implementation and close-out of all Utility projects against the approved Utility Fund Budget.
- Track funds encumbered and funds remaining on utility projects.
- Generate end-of-year reports.

Utility Documentation Electronic Storage

Demonstrate the functionality that will allow for Utility documents to be created, posted, and electronically stored (currently all documents are physically scanned) onto either an individual Utility account, a group of like documents, such as commercial and roll-off sanitation paperwork from outside vendor, stored for access within the department as well as the City.

- Currently link to City’s chosen vendor Hyland On-Base
- Link current M/C work order system to Hyland On-Base for records retention
- And replace M/C with an inclusive work order system associated to the selected new Utility Billing System



Reporting and Database Management

Demonstrate the functionality that will allow a city employee to manage via reports the Utility billing and customer service database to research, group, identify, review information such as monthly consumption billing statistics by customer class, meter size, etc.; monitor and list meter changes including date, old meter number, new meter number, meter size, account number, etc.; number of accounts by name, meter size, etc.

	Functionality	Usability
Overall		
Engineering		
Construction Project Management		
Facilities Maintenance – Work Order Management		
Facilities Maintenance – Work Order Reporting		
Utilities - Account Setup		
Utilities - Work Orders		
Utilities - Billing and Payment Receipt		
Utilities - Backflow		
Utilities - Geographic Information System (GIS) Integration		
Utilities - Supervisory Control and Data Acquisition		
Utilities - Cross Connection Control		
Utilities - Interconnects		
Utilities - Asset Management		
Utilities - Purchase Order/Invoice/Project Tracking		
Utilities - Documentation Electronic Storage		
Utilities - Reporting and Database Management		



What did you like most?

What did you like least?



Section 4: Procurement and Contracts

The purpose of this section is to demonstrate to the employees of the City of Pembroke Pines certain elements and functionality to enable their procurement and contracting activities. Demonstrate to the group the system's ability to support the procurement & contracts lifecycle from end to end. Show how a vendor would gain access to a portal for registration to submit bid proposals on open projects/solicitations. Show the ability for city employees to collect and review bid proposals at various stages of the process and generate status notifications and alerts on both initial proposals and active contracts. Show how the system can approve and award bids and execute contracts. Show how the system can monitor contracts for performance purposes.

City Account Set-up

- Explain the City account setup process.
- Can the City have multiple users with different access/workflows, etc.
- Can we limit other Departments from opening sealed bids and viewing information, however still allowing them to enter bids or search for vendors by commodity codes?

City Bid Creation

Show functionality that enables the City to create a solicitation in the system; including:

- Setting types (Quick Quote, Invitation for Bids, Request for Proposals, Requests for Qualifications, Notice to Sole Source, etc.)
- Setting advertisement dates, to automatically release a bid once it is fully approved
- Creating Line items for the vendors to bid on
- Approval Process for releasing the bids for public access/vendor download.
- Setting question and answer due dates and bid due dates
- Ability to set multiple commodities codes so that the solicitation is sent to vendors that have registered under the specified commodity codes.
- Ability to upload separate attachments, pdfs, word documents, excel files, zip files, auto cad files, etc.
- Electronic signature functionality.
- Ability to have pre-set standard documents that are available for use by checking boxes. Such as "Attachment C – Non-Collusive Affidavit", Attachment I – Standard Insurance Certificate", etc.
- Show the ability to also show the published bid solicitations and awarded bids within a portal or on the city website for the public to see and search through.



City Review and Open Bids

Show functionality that enables the City to review and open bids:

- Ability to review which vendors have downloaded the bid or reviewed it.
- Ability to ensure that the bids are sealed and no one besides the vendor would be able to see their bid, until after the bid has closed and it has been officially opened/decrypted by the user (City Clerk) that has access to open the bid.
- Ability to respond to questions individually and explanation of automated answers being sent out to the vendors and how long the message will take before being sent to the vendors.
- Demonstrate the ability to push addenda's (i.e. changes to bid criteria or further clarification of the project) to participating vendors.
- Ability to receive automated notifications of questions that have been submitted, and the ability to set multiple e-mail addresses for the automated messages of questions to be sent to.
- Ability to set information regarding Pre-Bid Meeting locations, dates and times.
- Demonstrate how the system will house a historical record of bids by vendor and how those bids can be queried.

City Reporting

Show functionality that enables the City to run reports on data:

- Ability to run reports showing the number of solicitations that were issued after a certain date, awarded by a certain date.
- Number of vendors responded to each bid within a certain time frame
- Savings based on estimated costs versus awarded amounts.
- Explain other reporting functionality.

Vendor Registration and Bid Queries

Show functionality that enables outside vendors to register themselves as candidates for projects via an online system portal and search for available projects/solicitations to submit bid proposals.

New Vendor Account Set-up

Show the setup of a new vendor with the following required information:

- The City required vendor information, i.e.:
- Operating Name, Legal Name, DBA, etc.
- Business Type (Corporation, Partnership, etc.)
- Federal ID, EIN, etc.
- Contact, Order and Remit-To information; contact person, business address, e-mail address, phone number, etc.
- Certification or license numbers
- NIGP Commodity Codes
- Completion and uploading of City required forms, such as the W-9, etc.



- The generation of account identifying information (i.e. account number) and login information for future access.
- Address whether the vendor would be able to utilize their account to view solicitations from other agencies that utilize your platform.
 - If so, please show the process in which a vendor would be able to select which agency solicitations they will be able to review.
- Please show the process in which the vendor can register to receive automated notifications for all solicitations issued by the City of Pembroke Pines, or if they can select to receive automated notifications for solicitations that have specific NIGP Commodity Codes.
 - Can one vendor account have multiple users that can view, download, and work on the bid submittal process?
- Does the vendor account tie to the Accounts Payable Vendor Account?
 - If so, can the Accounts Payables Department Deactivate a vendor for payment while leaving the vendor active for reviewing and submitting bids?
- Demonstrate the ability for a vendor to query and submit a bid/proposal on available projects/solicitations by utilizing the bid title, bid number, or by NIGP Commodity Code.
- Show how a vendor can drill down on project/solicitation information (view attached documents, etc.).
- Demonstrate how vendors can participate in an online Q&A session for the project/solicitation or the documentation attached to it.
 - Please advise on how and when vendors would receive notifications of the answers that are issued by the City, and on addenda/changes issued by the City.

Vendor Bid Submission

Take us through the functionality surrounding the vendors' ability to electronically submit a bid and all required supporting documentation.

- Show how a vendor can generate enter their bid by agency created line items, or using different criteria (i.e. by line item, by total number of units, by unit price).
- Demonstrate the ability to submit a base offer and/or alternative offers.
- Demonstrate the ability to attach supporting documentation (i.e. PDF, MS Word, and Excel files) to the bid submission.
- Show the ability for the vendor to enter notes and comments to the bid.
- Demonstrate the ability of the system to require a minimum/maximum bid amount prior to allowing the bid to be successfully submitted for review.
- Show the ability of the system to accept electronic signatures for completed bid submissions.
- Show the ability of the system to have the vendor complete webforms in which they would just electronically sign and submit without the need to upload again to the website.
- Show the system's ability to accept electronic bid securities (bid bonds).



Bid Selection and Review

Demonstrate the functionality to facilitate the selection of a single bid from multiple bid options and review that bid throughout different stages of the process up to and including the execution of a contract.

- Demonstrate how the system will tabulate the prices of all bids received in an easy to read format (with both options of sorted by line item and sorted by vendor)
- Demonstrate if the system can tabulate the options that a bidder selected in a form to easily compare all the bid submittal options selected by the vendors. (Such as a tabulation listing which vendors checked a box on a form stating they will or will not comply with a Drug Free Workplace requirement.)
- Show the ability of the system to generate alerts to the vendors as the submitted bid moves through various stages of the process, i.e.:
 - Acceptance of submitted bid,
 - Notice of intent to award/reject bids,
 - Ability for the City to control whether pricing and bid submittals will be made available to the public through the system based on a specified time frame, project type and project status, for instance:
- Pricing of all bids received for Construction Projects are public records as soon as bids are open, however the bid documents submitted are not public records until 30 days has passed from bid opening or the City has reached an intended decision to award a company.
- Pricing and bid documents submitted for Non-Construction Projects are not public records until 30 days has passed from bid opening or the City has reached an intended decision to award a company.
- If the City issues a notice to reject and re-issue the bid, the proposals would be exempt from public records for 1 year or until the City issues an intent to award the re-issued solicitation or withdraws the re-issued solicitation.
- Process to award the project to a vendor and upload documentation showing award
 - Is there any ability to automatically award after the City Commission awards the item at a Commission Meeting and the City Clerk's Department sets the agenda item as awarded?
- Demonstrate the ability to link a contract to a solicitation and the Purchase Order.

Contract Drafting and Execution

Show the functionality necessary to draft and execute contracts.

Demonstrate the ability of the user to create template agreements in the system that can be customizable for various contracts or bid awards.

- Show the ability of the system to include Contract Attachments, such as City solicitations, Vendor Proposals, Price Sheets, Payment & Performance Bonds, Insurance Certificates, etc.
- Show the ability of the system to route contracts for different levels of approval (i.e. contracts that exceed \$25,000.00 will require approval of the city commission), and to track changes and comments throughout the routing process.



- Include the ability of having vendors in the contract routing process so that they can comment and red line the agreement and attachments.
 - Address automated notifications for when contracts are routed for approvals and when changes are performed.
- Demonstrate the ability of the system to accept digital signatures from the City and the Vendor.

Contract Management and Tracking

Demonstrate the functionality necessary to monitor contract performance within the system.

- Demonstrate the ability of the system to generate alerts in the event that contract terms are violated (i.e. bonding becomes void, insurance lapses, other city violations).
- Show the ability of the system to generate notification for random contract audits (i.e. contracts that are subject to strict parameters such as phased completion dates, the usage of certain types of licensed laborers, etc.).
- Show the ability for the system to automatically generate Contract Performance Report Cards to be completed by the specified Contract Manager stating how the vendor is performing and whether they the Contract Manager would recommend renewal.
- Demonstrate the ability of the system to automatically generate monthly Contract Database Reports prior to the expiration of the contract (number of days before expiration shall be a minimum of 90 days prior to contract expiration, however may be longer as specified by the Contracts Department for specific contracts). The report shall contain a summary of the contract status, value, term and recommendation from the department from the Contract Performance Report Cards.
- Show the ability of the system to display a list of contracts with a summary and contract expiration dates on the City's website.
- Describe the ability of the Contract to be tied to Solicitation(s), Purchase Order(s), and Invoice(s) so that reports can be ran to determine if departments are approaching or exceeding the total allowable maximum expense under the contract.
 - If so, describe if the system can prevent the Departments from exceeding the contract amounts.

Requisitions and Purchase Orders

Demonstrate the ability to generate a purchase order request and the method by which it is approved. Also show how purchase requests can be assigned for approval. Demonstrate the steps required to convert a purchase order request into a PO after it has been fully approved and the ability to automatically e-mail it to the vendor, requester, and/or any other staff members, if desired.

- Demonstrate the ability to have a Requisition/Purchase Order tied to a Contract and/or Commission Approval.
- Demonstrate the ability to have a Requisition/Purchase Order that is made for a Contract that has a contract term that exceeds the fiscal year period, and how the Requisition will tie a certain amount of the funds to the current fiscal year budget and how it would address future fiscal



year budgets, to help ensure that the Departments do not exceed their approved Contract amounts.

- Demonstrate the ability for the system to tie one city-wide contract to multiple POs for different departments, to help ensure that the Departments do not exceed their approved Contract amounts.
- Demonstrate the ability for the system to tie one city-wide contract to one PO that is used for different departments, and how that PO can be managed to ensure that other departments can't process payments against another departments budget/line item.
- Demonstrate if vendors can be set up with specific Commodity Codes such as the NIGP Commodity Codes, and if reports can be run to find vendors and contact information based on the selection of Commodity Codes, to assist the Department in finding vendors that can provide a service when they are in need of obtaining quotes.
- Demonstrate the ability for the system to tie one city-wide contract to one PO that is used for different departments, and how that PO can be managed to ensure that other departments can't process payments against another departments budget/line item.
 - In addition, advise on what would happen if department "A" processes an invoice that exceeds department "A" approved budget/line item, while department "B" processes an invoice that does not exceed department "B" approved budget/line item. Will the system allow for Department "B" invoice to be processed, or will it be stopped due to Department "A" invoice?

	Functionality	Usability
Overall		
City Account Set-up		
City Bid Creation		
City Review and Open Bids		
City Reporting		
Vendor Registration and Bid Queries		
New Vendor Account Set-up		
Vendor Bid Submission		
Bid Selection and Review		
Contract Drafting and Execution		
Contract Management and Tracking		
Requisitions and Purchase Orders		



What did you like most?

What did you like least?



Section 5: Public Safety (Fire Dept., Police Dept. & Code Compliance)

The purpose of this section is to demonstrate to the employees of the City of Pembroke Pines certain elements and functionality of public safety activities associated with the fire and police departments which include timekeeping, scheduling, budgeting, records management, position management and logistics. In addition to these departmental activities, we would ask that you demonstrate some of the functionality surrounding code compliance as well.

Fire Department

The City of Pembroke Pines Fire Department (220+ employees) provides the following services to the community; fire suppression, fire prevention, building inspections, plan review, fire investigations, public fire safety education, disaster management, rescue, emergency medical services and hazardous materials initial response. Show how a system can support the following:

Annual Site inspections

Demonstrate the functionality necessary to interface with MobileEyes site inspection information.

- Show how the system can interface, supply information to other City departments to aid in correction of violations and/or issuance or renewal of occupational licenses.
- Show how the system can alert Code Compliance and/or other City departments of outstanding violations and/or compliance concerns.

Timekeeping (Maintained within Firehouse)

Demonstrate the functionality necessary to interface or import Firehouse employee timekeeping data in regard to payroll in the following manner:

Show how the system can integrate payroll data in regard to:

- Date & time, employee ID, pay code, pay type, narratives, etc.
- Demonstrate how the system tracks and different time allocations and the ability to pull reporting on payroll breakdowns by employee.
- Generate additional pay records based on assignments and/or shifts.

Performance Evaluations

Demonstrate the functionality necessary to manage fire department employee performance evaluations. Show how the system can track and maintain performance evaluations for individual employees for the life span of their career:

- Demonstrate the ability of the system to generate a performance evaluation dashboard (i.e. utilize the Performance Evaluation Form as a guide).
- Show how the dashboard can track employee employment anniversaries, upcoming evaluations that will be due and past evaluation results.
- Show how the system can generate notifications to employees and administration on change of status (i.e. as it pertains to evaluations).
- Demonstrate how the system can generate notifications to employees of pending disciplinary processes or the availability to appeal past performance reviews.



- From an administrative perspective, show how the system can maintain records associated with polygraph results, background checks, physical test results and interview results.
- Show how the system can calculate scoring for metrics for new employees as it relates to MESH scores, interview results and recommendations.

Logistics

Show how a fire department employee will track and monitor maintenance of equipment. Walk us through the system's ability to manage fire department facilities. Discuss how the system can integrate with government agencies (i.e. FEMA) for reporting.

- Demonstrate the ability of the system to monitor and track supply levels within the fire department.
- Show the system's ability to manage fleet maintenance and maintenance schedules. Demonstrate how alerts can be generated once maintenance is necessary for a specific fleet vehicle.
- Show the system's ability to comply with the FEMA requirement to generate reporting on all fire apparatuses.
- Show the system's ability to generate reporting on fire hydrant locations within the city and maintenance schedules for each hydrant.
- Demonstrate how the system will track and monitor the allocation of different fleet vehicles and personnel.

Budgeting

Show how a fire department employee will track and monitor budgets for the fire department.

- Demonstrate the ability of the system to set thresholds for budgets and spending by line item or area (i.e. by line item for a specific product such as floor cleaner or by area such as facilities cleaning supplies).
- Show the approval workflow process for budget submission and approval.
- Demonstrate the ability of the system to generate and track budgets for each individual fire department unit
- Show the ability of the system to generate reporting to compare current budgets to past budget figures.
- Demonstrate the ability of the system to generate budget forecasts based on past years spend.

Position Management

Show how a fire department employee will track and monitor open position requisitions.

- Demonstrate the ability of the system to manage and track open positions for employment.
- Show how the system can generate alerts for vacancies.
- Demonstrate the ability to differentiate between full time positions and contract positions.



	Functionality	Usability
Overall		
Annual Site Inspections		
Timekeeping (Interface from Firehouse)		
Performance Evaluations		
Logistics		
Budgeting		
Position Management		

What did you like most?

What did you like least?



Police Department

The purpose of this section is to walk through functionality necessary for the police department. Walk us through how police department employees can use functionality in the system to leverage records management. Show us how employees will handle time keeping and scheduling within the system. Demonstrate functionality surrounding performance evaluations for police department employees and logistics as it pertains to employee disbursement and asset management. Show how the system can leverage budgeting capabilities as well as manage some human resource capabilities surrounding job requisitions.

Records Management and Evidence Control

Walks us through the system's ability to manage records associated with evidence. Show the system's ability to integrate with outside government databases (i.e. Florida State Law Enforcement and the Federal Bureau of Investigations)

- Demonstrate the ability of the system to electronically log and track data and assets that are entered into the system for evidence purposes.
- Show how the system can audit current evidence inventory by location, date entered into the system and by individual who checks out the evidence.
- Show the system's ability to support biometric control for authentication and access to the system.
- Demonstrate the capability of the system to push and receive data from other government agencies (i.e. Florida State Law Enforcement and the Federal Bureau of Investigations).
- Show the system's ability to manipulate and reformat various file extracts (i.e. > Reformat extracted file to UCR --> Submit UCR to FBI & FDLE)

Timekeeping

Demonstrate the functionality necessary to manage police department employee timekeeping in the following manner:

- Show the system's ability to generate customizable schedule build outs in the system complete with resource allocation.
- Demonstrate the system's ability to generate customizable dashboards complete with personalized calendars for individual end users.
- Show the system's ability to track, at the employee level, the following metrics (attendance record, time off, training hours completed by course or discipline, accrued time, extra shifts, etc.).
- Demonstrate the approval process for schedule changes or time submissions that are either approved or not approved. Show how the system can generate alerts to employees for schedule or time card submission approval.
- Show how the timekeeping module integrates with the payroll system.
- Demonstrate the ability of the system to track and maintain employee schedules.



- Show how the system can generate and maintain employee work shifts and assignment of employees to specific shifts. Demonstrate how the system handles different job codes for different roles and different rates of pay based on the job code.

Scheduling and Records Management

Show how the system can handle scheduling and tracking of training classes for employees.

Demonstrate the functionality necessary to manage police department employee records and certifications. Show how the system can track and maintain pertinent certifications for individual employees for the life span of their career:

- Demonstrate the system's ability to link completed certification courses to an employees' master record.
- Show how the system can generate reporting on trainings and certifications completed by employees by the following metrics (pass/fail, by title, by division, by department, etc.).
- Show how the system can generate alerts that employee certifications are close to lapsing.
- Demonstrate how the system manages scheduling for certification classes (i.e. CPR, Course Trainings, etc.) and can generate alerts when classes are available to register in.
- Show how the system can maintain a class roster.
- Show the system's ability to create and store police department policies and how these policies can be accessed by employees.

Budgeting

Show how a fire department employee will track and monitor budgets for the fire department.

- Demonstrate the ability of the system to set thresholds for budgets and spending by line item or area (i.e. by line item for a specific product such as floor cleaner or by area such as facilities cleaning supplies).
- Show the approval workflow process for budget submission and approval.
- Demonstrate the ability of the system to generate and track budgets for each individual police department unit
- Show the ability of the system to generate reporting to compare current budgets to past budget figures.
- Demonstrate the ability of the system to generate budget forecasts based on past years spend.



Position Management

Show how a police department employee will track and monitor open position requisitions. Discuss how the system can support background check information on candidates.

- Show how the system will integrate with other departments to process and report on background checks for positions with the city (i.e. camps, parks, classes, sports, etc.).
- Show how the system will generate alerts and reporting for background check pass or fails.
- Demonstrate the ability of the system to manage and track open positions for employment.
- Show how the system can generate alerts for vacancies.
- Demonstrate the ability to differentiate between full time positions and contract positions.

Logistics

Show how a police department employee will track and monitor maintenance of equipment. Walk us through the system's ability to manage police department facilities. Discuss how the system can

- Demonstrate the ability of the system to monitor and track supply levels within the police department.
- Show the system's ability to manage fleet maintenance and maintenance schedules. Demonstrate how alerts can be generated once maintenance is necessary for a specific fleet vehicle.
- Show the system's ability to integrate with contracted dealerships for maintenance requests and maintenance reporting.
- Demonstrate how the system will track and monitor the allocation of different fleet vehicles and personnel.

	Functionality	Usability
Overall		
Records Management and Evidence Control		
Timekeeping		
Scheduling and Records Management		
Budgeting		
Position Management		
Logistics		



What did you like most?

What did you like least?



Code Compliance

The purpose of this section is to take us through the functionality surrounding a city employees' ability to manage code compliance.

Violation Logging and Tracking

Walk us through the system's ability to log and track code violations. Demonstrate how the system will handle workflows associated with inspection and resolution of violations.

- Demonstrate the ability to for the system to log and track complaints on code violations.
- Show how complaints can be entered into the system via an app or through a portal.
- Demonstrate the ability of the system to generate assignments for inspectors to handle complaints.
- Show the workflow of how complaints are received, assigned to an inspector, reviewed, and closed within the system.
- Show the system's ability to generate affidavit notices for follow ups on code compliance complaints.
- Demonstrate mobile capability for field personnel. Show how code violation notifications from the system can be received via smartphone/tablet to initiate inspection.

Mobility

Show us the functionality surrounding mobile capabilities for field workers conducting site visits for code violations. Show how workflow can still be completed without connectivity.

- Show how field service personnel can input data into the system in the field (i.e. onsite visits completed for compliance checks or notifications to verify tasks have been completed).
- Demonstrate the system's ability to operate without internet connectivity (i.e. completion of field personnel workflow notification and then notification sent when smartphone/tablet resyncs with internet connectivity).

Records Management

Demonstrate the functionality surrounding records management and report generation on code violations. Show the ability to drill down on reporting by geographic location and other metrics.

- Show the system's ability to generate reporting on compliance code violations (i.e. by the amount of violations lodged or closed, by cases by month, by the amount of fines issues, by the amount of hearings held, by the amount of re-inspections conducted, etc.).
- Demonstrate how the system can map and track submitted violations by a geographic area.
- Show how the system can assign work orders/service requests to specific field personnel based on location of the request or availability of the field personnel.



	Functionality	Usability
Overall		
Violation Logging and Tracking		
Mobility		
Records Management		

What did you like most?

What did you like least?



Section 6: Community Services

Pembroke pines provides a network of services for members of the community, activities and programs that enhance quality of life and provide personal enrichment in a safe, enjoyable, and professional environment. Some of these services include:

- Activities & Classes
- Adult Day Care
- Health Support
- Housing Division
- Social Services
- Transportation
- Volunteer Opportunities

To support some of these services the city requires transportation, admin, case management, activity registration and similar functionality. Please demonstrate the following elements of your system functionality:

Membership and Registration

A resident is interested in becoming a member, demonstrate how a resident can submit a request to schedule an appointment to complete registration, e.g. calendar view of available times or submit a request, request is routed to the appropriate person via workflow for follow-up and contact.

Case Management

Show how incident reports and clinical referrals can be documented in a form, stored in the system, and retrieved via a resident search. Show how the system can support the management of adult day care center activities, scheduling, registration, notifications and reminders of upcoming event or cancellations.

Transportation

The city has been using Easy Ride Software as their Transportation Management System, they find the functionality to be limited. Ideally the city would like to provide transportation services to the public with information such as routes, schedules, and notifications of delays communicated to residents via a mobile app.

Please take us through the process for providing routing/ mapping functionality.

Show how a request for transportation can be submitted by a resident and how they can be provided notification when the driver approaches the pickup location.



Property Management

The city has several owned/operated Senior Citizen Housing units. Demonstrate property management functionality with the ability to administer and track lease agreements and rental payments of each unit. Demonstrate additional functionality with regards to contract management, maintenance, and work order functionality. Currently “Rent Manager” software is being used, discuss how this software can interface with your software.

Reporting

The City of Pembroke Pines is required to comply with several reporting rules and are required to provide various reports to outside agencies. Show and discuss functionality that the system provides. Show how a user can create:

- Custom and standard reports
- Electronic forms and reports
- Automated report submission to agencies and third parties

Discuss or show the generation of some of the reports listed:

- Federal, State, and County compliant regulatory reports: (ADRC, DOEA, CIRT, EHEAP, etc.)
- Monthly CIRT Report (monthly count of members, services, etc. for Aging Disability Resource Center (ADRC))
- Weekly Cash Deposit Report (money collected for services report to City Finance Department)
- Grant Disbursement Report (monthly report to ADRC and Accounts Payable (AP))
- Revenue Report (monthly report to identify money received from services)
- Audit traceability for daily attendance / information compliance with Department of Elderly Affairs (DOEA)
- Compliance with Department of Elder Affairs - State of Florida Client Information & Registration Tracking System (CIRT)

	Functionality	Usability
Overall		
Membership and Registration		
Case Management		
Transportation		
Property Management		
Reporting		



What did you like most?

What did you like least?



Section 7: Parks and Recreation

Administration Management

- Demonstrate how activities are managed and updated and can be viewed through a dashboard. Demonstrate the cycle of setting up an activity, the activity has a beginning registration date and a closing date, the activity displays the min and max number of openings for the activity.
- Can the software manage wait lists when the activity fills up and is the customer automatically added to the waitlist or do the customer have to add themselves to the waitlist. If a spot in a class or a facility opens, is the spot reserved for the first person on the wait list or is staff notified when a spot is available.

How can reservations for buildings, rooms, fields (e.g. soccer, baseball) or picnic shelters be managed in the system. Demonstrate how the facilities are managed through a schedule with rental rates assigned to each facility.

Member Management

- Demonstrate how members can be managed in the system starting from member applying for membership (setup, number of members, residency verification, etc.)
- Show how various of levels for membership can be established, (e.g. annual, punch card etc.) If the membership requires an annual fee, show how a membership is marked as inactive until the fee is paid.

Activity Registration

The city provides many activities to the community show us how a resident can register for an activity through a web portal or a mobile app.

- Demonstrate how a member can register and pay for a class. Before submitting the registration, form show how the resident can return to the form and make an edit to the address. Also show how the system will not allow for the resident to complete registration without completing required fields. Also show how the system can allow payment in the following forms: credit card, check, auto-draft, debit, and e-check.
- Show how a cancellation of a class can be recorded in the system and how notification can be automatically provided to residents who have registered and how the registrant can be provided a refund for the class.
- Also talk about the potential for supporting touch screen systems to register for city activities and how a resident can swipe their member cards and to prepopulate application fields.



	Functionality	Usability
Overall		
Administration Management		
Member Management		
Activity Registration		

What did you like most?

What did you like least?



Section 8: City Clerk

City Clerk - Electronic Filing System (EFS)

The current system is a shared centralized document repository with secure document filing that allows for searches of keywords. At the present time, there is not public online access or portal to this system. They would like to enable public access of certain records such as adopted and executed ORDINANCES and RESOLUTIONS, and electronic forms, and the ability to ensure accessibility as required by statute.

Show how the system can support a centralized document repository with secure document filing and allow searches of keywords contained within the stored documents.

- Show how residents can use online or portal access to complete and submit electronic forms or requests online or via portal access.
- Show how the system can support the creation of legislative files by department, by autogenerating file ID, coversheet and PDF exhibits.
- Demonstrate public records tracking; record requests submitted via phone email or in-person. Capturing of data elements including; email address, request type, date, tracking number.

The current system for public records request tracking is WebQA (powered by GovQA). Members of the public can access it through the Clerk Department link on the city's website.

- Demonstrate system functionality for public records request tracking where the customer can track their own requests by creating an account with an email address and password.
- Request generates a tracking number of which a staff member can track internally while the customer can track it externally.
- In execution of requests show how a request can be assigned to a department (and automate email alerts when request is assigned) and add a targeted due date. Also associate a cost to the request and invoice requestor.
- Show how request status can be set and changed to open, closed or under review.

City Clerk - Contract Awards

Demonstrate functionality that supports the city clerk's contract awards process.

- Show how the system can support the use of over 7 contract awards package templates
- Show how documents can be electronically attached to a contract awards package
- Show how the contract can be sent to a vendor from the system and how procurement can associate the contract with a purchase order.
- Take us through a scenario where a mistake was made, show how a user can automate the generation of a performance bond request/ notification with the bank.
- Also show how the system can automate the execution of a "Notice to proceed"



City Clerk - Cashiering & Local Business Tax Receipt (LBTR)

The city clerk needs a system to support the processing of payments for multiple services, fines and licenses including: water, tree removal, garage sales permits, code violations, lobbyist fees, and LBTR. Demonstrate how a user can process each of the following payment methods:

- Cash
- Check
- Money order (so – larger check numbers)
- ACH
- Credit/ Debit card

Also take us through the cashier transactions that could be made in a scenario where a resident applies a deposit and the system's ability to reconcile collected versus deposited monies.

- Show how to search past cashiering transactions by name, customer account # (such as Utilities, LBTR, etc.), check number, date, permit #.
- Show how to void cashiering transactions before they are posted to appropriate system.

Florida requires residents who own a business to apply for a City business license, which is known as a Local Business Tax Receipt (LBTR).

- Show the ability input LTBR details into a form
- Show how an LBTR can be edited or deleted
- Show LBTR reports for: close year end, closed accounts, zoning reports
-

City Clerk - Local Business Tax Receipts/Licensing

Show system functionality that can support many user defined licensing categories including but not limited to: commercial, home- based, food truck, events and solicitation.

- Show the ability to setup a license application form/ process and define requirements (attachment of documentation), calculate fees based on selections made in the application process.
- Once the application is received, demonstrate how applications can be reviewed for required documentation, fees collected, etc. to approve and route to departments for further processing and approval. Demonstrate the following workflow:

The application(s) sent to Planning/ Zoning Department for review. The Planning Department reviews the application, makes notes and sends the file to the Building Department for review. Building Department makes decisions on which inspections are needed. They determine only a "Fire Inspection" is required, the file is routed to Fire Prevention Department. Show how a status can be assigned to a file until inspections are completed or denied. When everything is completed show the workflow back to the Clerk to finalize the license.



- Show how License applications can be routed to multiple departments for approval and provide notification.
- Also demonstrate how the approvals can be tracked and defined by a status.
- Once license is approved show a license number can be automatically assigned.
- Some licenses are non-renewable, show how this can be defined in the system and how you can set up to have the license removed from the active license list when they expire.
- Show how notifications for license renewal can be automatically sent to an applicant in advance of license expiry.

City Clerk – New Bonds, Letters of Credit and Performance Bonds

Prior to the Bond being sent to the City Clerk's Office, each Bond would be uploaded to the system.

Demonstrate how a bond can be entered or uploaded with the required information.

- DOCUMENT TYPE GROUP: Engineering
- DOCUMENT TYPES: Select the type of Bond or Letter of Credit from the drop-down key
- KEY FIELDS:
 - Bond Number
 - Project Name
 - Project Type (Drop Down Key)
 - Bond Type (Drop Down Key)
 - Amount
 - Bond Status
 - Creation Date
 - Company
 - Engineer
 - Owner
 - Notes

When the Bonds are delivered to the Clerk's office, with the following items: The Agenda Request Form and/or Memorandum from the City Engineer, documenting the reason for submittal, would be attached to the record.

Once the bond or a letter of credit is entered the bond would be in a pending status until released by Commission. Show how a bond can be released when approval is granted, the approval document would be attached to the bond record.



Performance Bonds

Show the system functionality for processing performance bonds for the following examples:

- Amended bonds (amount reduction)
- Same projects changing from project bonds to maintenance bonds
- Same contractor/project but the name of the development may change
- A project having multiple bonds for release
- Special circumstances where the bond would not be sent back to the original bank or insurance company.

	Functionality	Usability
Overall		
City Clerk - Electronic Filing System (EFS)		
City Clerk - Contract Awards		
City Clerk - Cashiering & Local Business Tax Receipt (LBTR)		
City Clerk – New Bonds, Letters of Credit and Performance Bonds		
Performance Bonds		

What did you like most?



What did you like least?



Section 9: Buildings

Demonstrate the functionality and process of submission a license application and or building permit request from preliminary review through final approval.

Permits

Residents and contractors are required to apply to the city for permits, show how the system can support permit activity including:

- Show the process for electronically reviewing and approving permit applications, decline one application, approve another, show us the notification that is submitted to the applicant in each scenario. Show how to view the stage or status of a permit submitted.
- Show a sample of a letters that can be automatically sent to owners / contractors 150+ days past permit inspection deadlines
- Show digital plan review with revision tracking
- Show how to place a stop work order on any application / permit
- Show plan review cycle times such as
 - Average review time per job
 - Overall time to issuance
 - Average review cycle times
- Show DMS (Document Management System) capabilities
- Demonstrate workflow capabilities when creating permit types such as
 - Required reviews
 - Required documents/letters/licenses
 - Required inspections
 - Required Fees
- Show GIS integration with permit analysis such as
 - List all permits associated to a given parcel
 - Show how to apply for a permit from a GIS interface
 - Show specific permits within a geographical area
 - Show open and closed permits graphically

Licensing

Show how a license application can be completed and submitted online and attach required documentation to an application.

- Enter business license on the date of issue
- Issue business license renewals at various times
- Show how licenses can be automatically flagged as they near renewal date.
- Flag licenses in the system for contractors which are not allowed to pull permits
- Show monies due to the City for outstanding permits by Contractor
- Show the ability to add qualifiers



Certificate of Occupancy process

The certificate of occupancy (CO) provides an acknowledgement that a structure/ building has been erected or altered in accordance with law and is in a livable condition. Temporary certificate of occupancy (TCO) may also be granted in some cases. Prove that the system can provide the following functionality to support this certification process:

- Provide visibility and access to CO to the police department.
- Submit an electronic TCO inspection request to fire department.
- Apply a barcode to building plan for traceability.
- Electronically upload CO and TCO document to the system and store (for the life of the building).

Inspection

To authorize some permits and certificates inspection is required, please show us how the system can be used to support functionality related to inspection including the following:

- Schedule: Online inspection scheduling (phone requests allowed as needed).
- Assign and Notify: Automated notifications of scheduled inspections to designated inspector.
- Status reports/ worklist: Generate Inspection Report (roster) of pending inspections.
- Inspection execution: Mobile / tablet functionality for inspectors with electronic inspection form completed via tablet inputting data including.
- Updates: Show automated inspection result updates in the system.
- Provide inspection capping for work load balancing.
- Show bulk inspection assignment for field inspectors.
- Show how to attach files to an inspection.

Fee Management

- The collection of application, plan review, c.o., inspection violations, and submittal fee's, as well as the refunding of fee's. I believe we also collect fees for outside organizations, like south Florida water district.
- Co/cc fee estimate program – the amount of these fee's sometimes takes owners by surprise.



Reporting

Demonstrate the ability to provide advanced reporting capabilities to:

- Extract data into Word / Excel formats for manipulation.

Show the system's capabilities to create specific reports:

- Fees Activity Report (monthly submittal to BORA)
- Clerk Report
- Number of applications received for given period of time
- Certificate of Occupancy (CO) Report
- Voided permits reports
- System KPI's
- Building Permit Report
- Building Permit Activity
- Revenue reports
- End of day reconciliation reports
- Operation efficiency reports
- Licensing expiration reports
- Permit issuance reports
- Expired permits reports

	Functionality	Usability
Overall		
Permits		
Licensing		
Certificate of Occupancy		
Inspection		
Fee Management		
Reporting		



What did you like most?

What did you like least?



Section 10: Planning and Economic Development

The purpose of this section is to demonstrate to the employees of the City of Pembroke Pines certain elements and functionality to enable their planning and economic development activities. Show how both citizens and vendors of the city can access a portal to submit permit documentation and check the status of applied for permits and licenses. Demonstrate the project management functionality within the system as it pertains to managing and tracking aspects of permitted projects within the city. Show how the city can collect payments on permits and manage distribution of grant funds or other types of funds to third party contractors working on permitted projects. Demonstrate mobile capability for field inspections conducted by city employees. Show how both citizens and vendors of the city can access a portal to submit permit documentation and check the status of applied for permits and licenses.

Permit and License Registration

Show functionality that enables citizens and outside vendors to submit, manage and track applications for permits and licenses via a system portal and search for specific permits and licenses based on license class and code:

- Show the ability for a citizen or vendor to access a city portal to query specific available city permits and licenses by class or code.
 - Show the systems' ability to describe what the permit or license is related to (i.e. the definition of the permit or license and what it is needed for).
 - Demonstrate how the system can provide a detailed list of required documents to successfully apply for specific licenses or permits.
- Once a new permit or license is selected, show the application process. Walk us through the registration of the citizen or vendor for the new licenses and show how an individual account can be created that is coded to the applicant.
 - Demonstrate how a citizen or vendor can use their account number to log back into the system to either finish an application that was previously started or check the status of their application.
- Demonstrate the ability for a citizen or vendor to electronically upload supporting documentation necessary for the application.
- Show how the system will generate alerts to both city officials and applicants of various statuses of the application (i.e. submitted, approval pending, approved/rejected, etc.).
- Show how a citizen or vendor can utilize a scheduling tool to set planning meetings with the city once their permit or license is approved.
- Demonstrate how a citizen or vendor can submit an appeal of a rejected permit or license application through the portal.
- Demonstrate how a city employee can access specific criteria (i.e. zoning requirements) by active permitted or licensed projects or citizen and vendor accounts to cross reference if those requirements are being met during field inspections.
- Demonstrate mobile capability for field personnel. Show how notifications from the system can be received via smartphone/tablet to initiate a field inspection of a permit or license site.
- Show how field service personnel can input data into the system in the field (i.e. inspection notes).



Project Management

Show functionality that enables city employees to manage and track citizens and outside vendor's project status.

- Show how a city employee can reference permit or license expiration dates and link that data to current active projects or citizen and vendor accounts.
- Demonstrate how a city employee can access specific criteria (i.e. zoning requirements) by active permitted or licensed projects or citizen and vendor accounts to cross reference if those requirements are being met during field inspections.
- Show how a city employee can attach notes to a specific permitted or licensed project or citizen and vendor accounts regarding adherence to permit and license requirements or zoning.
- Demonstrate mobile capability for field personnel. Show how notifications from the system can be received via smartphone/tablet to initiate a field inspection of a permit or license site.
- Show how field service personnel can input data into the system in the field (i.e. inspection notes).
- Demonstrate the system's ability to operate without internet connectivity (i.e. completion of field personnel workflow notification and then notification sent when smartphone/tablet resyncs with internet connectivity).
- In the event the city is managing an outside vendor that was awarded a permit to complete work on the cities behalf, demonstrate how a city employee can track contractor time billed to a project.

Payment Collection and Disbursement

Show functionality necessary for city employees to collect and disburse fees and payments associated with permits, licenses and the management of city engaged vendors.

- Demonstrate the ability of the system to perform a three-way match (i.e. invoice, permit, license or account number, payment).
- Show how citizens and vendors can remit payments through the city portal (i.e. by credit card, check draft, etc.).
- Demonstrate how city employees can manage tracking and issuing the disbursement of payments for third party contractors (i.e. payments can be disbursed from specific grants and loans).
- Show how a city employee can monitor the status of grant and loan payments against grant and loan budgets.
- Demonstrate the ability of the system to perform a three-way match (i.e. invoice, permit, license or account number, payment).
- Demonstrate how city employees can manage tracking and issuing the disbursement of payments for third party contractors (i.e. payments can be disbursed from specific grants and loans).



Contract Execution and Fee Collection

Show the functionality necessary to execute contracts and receive associated fees within the system.

- Demonstrate the ability of the system to generate template or customizable contracts.
- Show the ability of the system to route contracts for different levels of approval (i.e. contracts that exceed \$25,000.00 will require approval of the city commission).
- Demonstrate the ability of the system to collect fees associated with contracts (i.e. research fees, document fees, bid deposit).

	Functionality	Usability
Overall		
Permit and License Registration		
Project Management		
Payment Collection and Disbursement		
Contract Execution and Fee Collection		

What did you like most?



What did you like least?



Section 11: Human Resources and Payroll

The purpose of this session is to demonstrate to the employees of Pembroke Pines certain elements and functionality to enable their critical human resource and payroll activities. Demonstrate to the group the system's ability to support multiple levels of municipal structure (i.e. state, city, department, employee, assets, associated insurances, etc.). Show business processes which include all personnel administration and workforce management. All functionality should also support both permanent and temporary employee types.

Applicant Tracking/New Hire

Take us through the end to end process for hiring a new employee, Department manager has a vacancy, demonstrate how a job requisition can be submitted to HR, upon approval job opening is posted to website. Applicant enters resume/professional information into a central database via Interactive Voice Response, Internet, Kiosk, etc.

Applicants are routed to HR for qualification, HR will update qualification status and route qualified applicants to manager for review. Hiring manager will conduct interviews and update records with comments and make selection. After the applicant is selected, the system would provide a letter of offer template for modification and routing for approval based on position and the user defined requirements.

After an applicant is hired and final approval occurs, the system automatically changes status of applicant to employee, the system will automatically provide benefits eligibility information based on the employee's position and routed to appropriate insurance and benefit carriers and financial institutions.

Learning Management

Demonstrate functionality to ensure training is facilitated and tracked for all employees. Emphasize the following capabilities:

- Creation of eLearning content
- eConference capabilities (i.e. live audio, video, etc.)
- Transmission of learning content to internal and external audiences
- New hire onboarding (Setting up email, equipment requisitions etc.) and training (required new hire training facilitation and sign off) and tracking
- Tracking and assignment of training (routine, policy change training with employee acknowledgement). Show the system can be setup to trigger necessary training or certification for an employee. Show how training completions and certifications can be captured on an employee record.



Employee Lifecycle and Performance Management

Take us through the system functions which support employee performance:

- Show how a manager can be triggered to document annual or quarterly reviews/ performance evaluations.
- Show the how a manager can record performance commentary and attach to employee records.
- Show how the system supports functionality to allow Change of status. Take us through the steps required to complete a transfer, demotion/promotion, LOA, FMLA.
- Demonstrate how disciplinary action and termination can be recorded in the system.
- Display a performance improvement plan for an employee, show how an employee can electronically confirm their acceptance of the proposed plan and has access to review the plan.
- Evaluation appeal forms and processing- Show how an employee can complete an appeal form and how the appeal can be processed through workflow and approval by Human Resources representative. (Status of appeal should be open or closed and associated to employee record).

Benefits Administration

Demonstrate the ability to support the following benefit types and interface with benefit carriers (i.e. Cobra) including online enrollment for more than 8 programs as well as support active and passive enrollment processes. Take us through the scenario of a new hire enrolling in policies and emphasize the following elements:

- Life Insurance (AD&D, Supplemental, STD, LTD, etc.)
- Health, Dental, Vision insurance
- Aflac- accident or illness coverage
- Contributions such as 401K/ retirement plans and ICMA deferred compensation
- Show how changes can be made to benefits election but restricted by Date of Hire, job or contract code, and open enrollment timeframes.

Show the ability to support retiree benefits programs including health and life insurance coverage as well as the below listed scenarios:

- The ability to calculate imputed income rates:
Manually calculated based on CBA (Collective Bargaining Agreement) due to differing health costs then entered in database. System does IN/OUT similar to GTL. Each bargaining unit has different insurance rates.
- The ability to calculate various accrual methods for benefits:
 - 1) They are separated by dates earned due to union contracts. We call them bins and we currently have 3 different bins. Where Bin #1 is pensionable (F & P) and is 100% paid out. Bin #2 & Bin #3 have different parameters
 - 2) Yearly accrual amounts (sick & vacation) are different depending on CBA/employee type
 - 3) Some accruals stop when a certain max is reached others are paid out at FYE if they exceed max.
 - 4) Accruals that expire if not used by a specific date {system zeros out automatically}



- The ability to track accrued PT hours with notifications to HR of eligible benefits - FORM 1095-C: current system tracks PT hours and notifies HR when an employee is eligible for benefits. We provide a W-2 database file along with the UMR Health insurance file to 3rd party for form creation and filing. (3rd Party is Sky AC reporting) - Sky Insurance tech.
- The ability to automate F/F supplemental billing F/F Supplemental quarterly billing is a manual process. Would like to know if we can automate (Billing to the state - can this be automated).

Time and Attendance

The time and attendance application should have the following capabilities:

- Electronic time capture capabilities utilizing the computers, smart phones, tablets, and internet.
- Ability to work in 24/7 and union environments.
- Calculation rules and enforcement show how time and attendance rules can be established for various employee groups, (e.g. employees under a collective bargained agreement, shift employees, salary, seasonal, etc.)
- Flexible workflow approvals at multiple levels, demonstrate workflow for an employee requesting time off, request is routed to manager for approval, manager approves, and employee receives notification of approval.
- Demonstrate absence management including accrual tracking.
- Show scheduling and resource planning functionality.
- Demonstrate Employee Self Service capabilities.
- Demonstrate reporting and querying capabilities.

Payroll

A new payroll system would require the ability to enter and maintain payroll information from many departments. The system will be required to provide concurrent use of multiple pay periods.

Demonstrate multiple pay frequencies (e.g. monthly, semi-monthly, biweekly, weekly and off-cycle)

- Illustrate a typical payroll processing cycle, including the steps initiated by users and screens accessed by various users. Include an explanation of lockout features, checkpoints in the process, etc.
- Show ability to add any pay or benefit field to the earnings statements
- Capture ability to process in one cycle all pay types, but not pay certain pay types whose time has not yet been recorded.
- Produce earnings advice via letter, e-mail, or post to a web site.
- Print one-time information messages on earnings advice that can vary by employee type.
- Enter and process an employee garnishment, demonstrate how garnishment rules are established and how multiple garnishments are priorities and initiated for 1 employee pay check (e.g. child support, unpaid debts, etc.)
- Processing retroactive payroll adjustments.
- Show how to set-up selected on-call employees for positive pay and autopay including exception pay with or without stop dates (e.g. overtime, shift, or on-call reimbursements).



Demonstrate the ability of Travel Management module (from paying a registration fee and hotel reservation to completion of the travel where we reimburse the employee with mileage and parking, etc.)

Payroll Runs and Simulation

Show how the system can support the following types of pay roll runs:

- Recurring
- Adhoc- for termination payment, corrections etc.
- Special payouts for Charter school summer school, excess pension for retirees, split- payroll, accrual payouts.

Demonstrate functionality of a payroll simulator tool:

- Running a pay cycle simulation to check for errors prior to the cycle run time.
- Demonstrate how a payroll admin can run what if scenarios such as what is the effect on my pay if I make a change in my pension contribution.
- Show how the system allows the option to simulate payroll in production environment without generating actual payroll transactions, show the generation of a “fall-out” report.

Employee Portal

Demonstrate functionality achieved using an integrated HRIS employee portal in accordance with Florida state regulations providing the following for employees:

- Real time salary/ hourly pay rate updates
- Real time withholdings
- Direct deposit changes
- Employee history
- Pay statement and W-2 retrieval

Reporting

Demonstrate reporting functionality:

- The ability to generate reports of payroll activity and tax details via standard reports or via query tool.
- Ability to modify standard reports or create custom reports to meet the City requirements.
- The ability to support the following tax forms: 941, 945, 1099, W-2, Unemployment, EEO.



	Functionality	Usability
Overall		
Applicant Tracking/New Hire		
Learning Management		
Employee Lifecycle and Performance Management		
Benefits Administration		
Time and Attendance		
Payroll		
Payroll Runs and Simulation		
Employee Portal		
Reporting		

What did you like most?

What did you like least?



Section 12: Schools

The City of Pembroke Pines supports the operations of a number of schools. During this session emphasize how the city is set up in the system as a single district with multiple schools. Please demonstrate to us functionality in the system that will support Student Information System (SIS), Special education management functionality, Food Services, Accountability, Fleet management.

Integration of Programs

Also discuss the system's ability to integrate with:

- iReady
- Canvas
- Term Database SIS
- Focus Database SIS
- Pinnacle
- Jupiter Grades
- Smart Choice Lottery System (charter schools)
- ProCare
- Special Education system
- Food Service (ChartWells)
- Florida Direct Certification Reporting
- Broward County Assessment Program (BASIS)
- Integration with Smart choice lottery system including the following capabilities:
 - Student registration (online or in- person)
 - Random lottery drawing for selected students
 - Generate Student waitlist
 - Electronic communications and notifications in the system.

School Definition Setup

- Show a setup with four different numerical school ID'S
- Directional naming convention (East, West, etc.)
- Sponsored school (i.e. FSU elementary lab school Tallahassee by Leon County)



School Portals

Student Information System: show how the system can support or integrate with 4 defined portals one for students, one for parents, one for educator, and one for administrators.

Student Portal:

- Canvas Integration
- Course enrollment and re-enrollment
- Grades and Performance
- Two communication via: email, text, blast messaging

Parent Portal:

- Online payments with fee totals, alerts and notifications
- Logging and tracking of volunteer hours
- View and register for extracurricular activities and field trips
- Online registration and enrollment and re-enrollment
- Access electronic forms, waivers and authorizations
- Two communication via: email, text, blast messaging
- Access electronic forms, waivers and authorization

Educator Portal:

- Grades and Performance
- Reporting capabilities
- Course enrollment
- Attendance
- Two communication via: email, text, blast messaging
- In-service Hours and Certification Tracking
- Access electronic forms, waivers and authorization

Administration Portal:

- Grades and Performance
- Reporting capabilities
- Course enrollment
- Attendance
- Two communication via: email, text, blast messaging
- In-service Hours and Certification Tracking
- Access electronic forms, waivers and authorization



Student Metrics

Show us how the system can support the tracking of including:

- Attendance
- Grades and performance
- Progression monitoring
- Disciplinary actions
- Health records
- Volunteer Hours
- Fees
- Reduced and free lunch
- Demographics (Gender, Race, Ethnicity, household size and income)

Response to Intervention (RTI)

Schools are required to comply with a national process (Response to intervention (RTI)) which is intended to promote early identification and monitor progress of students with learning and behavior needs. This process requires certain reporting and document management functionality. Show the ability to store screening results for each learner, categorize learners who are identified as being “at risk” and attach notes and statistics in the system to enable measurement of success of the program.

- Student reporting
- Progress monitoring
- Data Integration
- Data input: notes and statistics

Communication

Demonstrate the systems capabilities for the various communication methods:

- Email capabilities
- Text messages
- Blast messages and announcements

Special Education Management

Schools are required to provide special education and these programs have some specific system requirements, take us through some scenarios to display system functionality supporting:

- Logic and regulatory compliance in creating individual education programs (IEP)
- Route management and tracking of transportation for special needs students
- Compatibility with programs such as Easy IEP



Care Services, Before and After School

Demonstrate how the system allows for scheduling and tracking of attendance, generates a roster from registered students and show processing of a payment for after school services.

- Differentiate regular school day from before and aftercare services

Asset tracking

Demonstrate RFID or barcode tracking that is supported by the system for the tracking assets.

Fleet management integration: Pembroke Pines schools are currently equipped with 49 buses which are managed by the Transportation Authority. Show how the system is able to integrate with the Fleet management System to collect and report metrics and track bus maintenance.

Food Service: The food services for schools are managed through Compass Group-Chartwells; show or explain how integration with this system can provide:

- Visibility to school lunch menus
- Linkage between student food account to student school ID/ personal number
- Student food account with visibility to account balances (Some lunches are provided free or at reduced rate)
- Enable payments and prepayments for lunches through a web portal

Additional Functionality:

- Entry tracking and monitoring of volunteer hours required and completed and activity fee (Charter school parents are required to volunteer "X" hours each school year).
- Generate Usernames and Passwords
- Uploading of documents by parents and administrators. For example, birth certificate, health forms, etc.
- Online payments with fee totals, alerts and notifications
- Access electronic forms, waivers and authorizations
- Integration with smart choice lottery system including the following capabilities.
 - Be able to accept a CSV file of New Enrollments, Re-enrollments and reassignments (aka transfers).
 - Or provide a lottery and enrollment system.
 - Student registration (online and in- person)
 - Random lottery drawing for selected students with ability to weight applications based on specific set of rules and the Schools' Charters. For example, Pembroke Pines residents are placed higher than non-pines-residents.
- Generate Student waitlist that meet the criteria as outlined in the school charters for example FSU has 96 categories.



- Have students flow through a feeder pattern starting at the 4 elementary schools à 3 middle à 1 high school.
- Handle new, re-assignments, and re-enrollments.
- Electronic communications and notifications in the system.

	Functionality	Usability
Overall		
Integration of Programs		
School Definition Setup		
School Portals		
Student Metrics		
Response to Intervention (RTI)		
Communication		
Special Education Management		
Care Services, Before and After School		
Asset Tracking		
Fleet Management Integration		
Food Service		
Additional Functionality		

What did you like most?



What did you like least?
