Office of the Illinois State Treasurer
Michael W. Frerichs

Request for Proposals
Human Resource Management Information System
370-800-27-027

Addendum 1
August 18, 2026

Below are the questions received by the Office of the Illinois State Treasurer ("Treasurer") and the Treasurer's responses. But for minor edits to ensure the removal of identifying information, the questions listed herein are intended to be accurate representations of the questions received; as such, any errors in usage or spelling have not been corrected. Any capitalized terms that are not defined herein have the meaning set forth in the Request for Proposals Human Resource Management Information System 370-800-27-027 ("RFP") published by the Treasurer on July 30, 2026.

1. **Local Presence:** Is having a physical presence in Illinois a strict mandatory requirement to bid, or is it evaluated solely as part of the evaluation scoring criteria?

    While this is indeed a scoring criterion, Respondent must also be able to show in its Proposal a presence in the State of Illinois.

2. **State Licensing:** Do we need to hold and submit the required State of Illinois license at the time of proposal submission, or can the selected vendor provide it upon contract award?

    If there is a required license that Respondent cannot provide at the time of the Proposal, please explain the basis for its unavailability. The Treasurer reserves the right to reject a Proposal that does not contain a required license, but may in its discretion, and depending on the license at issue, allow this to indeed be cured before award.

3. **SOC 1 / SOC 2 Certifications:** Is the full SOC 1/2 audit certification required to be submitted directly with the proposal, or may we provide a relevant audit summary/report during the bidding phase?

    Respondents should provide the certification with the Proposal if possible; if not, please provide the reason it is unavailable, including any reason Respondent has no certification and the status of any attempt at certification.

4. We noted that the RFP includes requirements for a linked applicant tracking, recruiting, and onboarding solution integrated with the HRIS, and references the Treasurer's current use of JazzHR for these functions. Could you please clarify whether the Treasurer would consider a proposal from a vendor providing only the ATS [Applicant Tracking System], recruiting, and onboarding components of the solution[?] Based on our review, the RFP appears to be seeking a single, integrated enterprise HRIS solution, but we would appreciate confirmation regarding whether module-specific responses are permissible.

While the Treasurer may be more likely to select a Proposal that includes all Services, the Treasurer would welcome Proposals that meet only a portion of the Services and reserves the right to award more than one Agreement in the event that Proposal is selected for award.

5. How many Employees does the agency have?

   As stated in Section III.M.1 of the RFP, the HRIS should be able to accommodate 270 users. The Treasurer currently has 228 full-time employees, 19 contractual employees, five temporary employees and six interns.

6. Benefits: How many unique benefit providers?

   At this time two, OrgChart and Jazz HR. In the future and as stated on Appendix B, Section 10.D, the Treasurer may need to integrate with a Central Payroll system utilized by the Illinois Department of Central Management Services ("CMS"); however, any such integration may be accomplished with a report as opposed to directly integrating with the Central Payroll system.

7. Benefits: Do Employees currently submit online or via a paper form?

   Online.

8. Benefits: What are the benefit providers?

   Please see the response to Question #6. The Treasurer's current system does not directly incorporate employee benefits such as insurance, flexible spending, or deferred compensation.

9. Time Management (Section G): Does the agency intend to purchase new Time Clocks?

   The Treasurer utilizes an online timekeeping solution, and would not intend to purchase time clocks.

10. Time Management (Section G): What is the current time vendor?

    ADP, Inc.

11. Time Management (Section G): How many time codes does the agency have?

    While the Treasurer would reserve the right to include additional needed time codes, those currently utilized include regular time, overtime, double time, holiday, sick time, bereavement, jury duty, vacation, veterans sick leave, personal, compensatory time, earned equivalent time, floating holiday, military leave, maternity-paternity leave, paid leave time, and "other."

12. Time Management (Section G): Do employees currently key their own time, badge swipe?

Employees currently use an online time punch or, if work responsibilities prevent use of the time punch, may enter time manually in an online timecard. Employees are required to enter a comment on any manual entry explaining why the online time punch was not used.

13. Time Management (Section G): Are there timekeepers? If so, how many? Is this the intent after go-live?

    Please see the response to Question #5.

14. Time Management (Section G): Does the employee adhere to attestation? If yes, weekly, daily, etc.?

    Timesheets are approved online each week.

15. Time Management (Section G): Does the agency track Leave (i.e. FMLA, intermittent leave, etc.)? Is there a current system that helps with the documentation and compliance? If yes, what?

    The current system, provided by ADP, Inc., helps with tracking leave.

16. What is the agencies current Payroll system? Is the intent to continue with that?
    a. How many company codes/controlling areas?
    b. How many payroll areas (i.e. Bi-weekly, weekly, etc)
        i. How many EE's within each payroll area
    c. How many union contracts?
    d. Does the Agency submit payroll to the IOC?

    The Treasurer currently utilizes the Central Payroll system provided by CMS, but does not intend to continue to use that system; in the event the Treasurer indeed continues to use the CMS Central Payroll system, the Treasurer may require the HRIS to integrate with that Central Payroll system. The Treasurer has one (1) company code, controlling area, and payroll area that includes all employees and twice-monthly payroll. The Treasurer has collective bargaining agreements with three (3) collective bargaining units. Treasurer employees are paid through the Illinois Office of the Comptroller.

17. Talent Management: How many requisitions, on average, does the agency have annually?

    25 – 30

18. Talent Management: How many unique requisition templates are currently utilized? Do managers submit the requisition or does it come from HR?

    It comes from HR, which uses the same requisition template for each requisition.

19. Talent Management: Does the agency currently have job descriptions for all jobs? If no, is the intent to create these?

    Yes, the Treasurer has written description for all current Treasurer jobs.

20. Talent Management: How many union contracts does the agency currently have? How many unique Performance Form Templates are utilized?

    The Treasurer has collective bargaining agreements with three (3) collective bargaining units. The Treasurer currently utilizes four (4) unique performance form templates.

21. Talent Management: What is the current LMS?

    The same current system provided by ADP, Inc.

22. Integrations: Can we get a list of integrations currently handled by the agency and the type of information within each?

    The Treasurer utilizes Jazz HR for the Services identified in Section III.C.7 of the RFP, and OrgChart for the Services identified in Section III.F.3 of the RFP.

23. Can the Submission Deadline be extended by 2 weeks?

    No. The Treasurer's agreement with current provider ADP, Inc. expires in early 2027; the Treasurer would need to retain the current schedule in case of any need to transition to a new provider.

24. Please clarify the intended scope of "Employee fiscal forecasting" in Appendix B. Specifically, is the Treasurer seeking workforce cost forecasting, position/FTE budgeting, salary and benefit forecasting, appropriation/fund-based labor forecasting, or another capability?

    The intended scope of "Employee fiscal forecasting" is the ability to generate reports for future dates using the current employee and compensation information maintained in the HRIS. The HRIS should be able to use the information currently on record (e.g. employee status, position, salary, benefits) to calculate and project workforce costs for a specified future period.

25. Please provide the number of unions and bargaining units supported by the Treasurer.

    Please see the response to Question #16.

26. Beyond the training and reference-guide requirements in Section P, does the Treasurer expect the bidder to provide organizational change management services, such as stakeholder analysis, change impact assessment, communications, readiness assessments, resistance management, or adoption measurement?

    No, although the Contractor would be required to assist in implementation as described in the RFP.

27. Does "comprehensive training" mean instructor-led training for every affected employee, or may the bidder propose a blended approach using instructor-led sessions, virtual training, recordings, job aids, and self-paced learning?

Treasurer approval will be required for any training approach before implementation. However, Respondents may propose approaches that they feel best meet the Treasurer's needs stated in the RFP.

28. Will training be delivered during normal business hours, and will multiple sessions, shifts, evening sessions, or weekend sessions be required?

    Multiple sessions may be required, but all training would be expected during normal business hours.

29. What accessibility standards must training materials and the online reference guide meet, including any applicable requirements under WCAG, Section 508, or Illinois accessibility standards?

    Proposals must meet all accessibility standards applicable to the Services as provided to an Illinois government body.

30. In Section III. B.2, the RFP references storing 'allocation data' as part of employee records. Can you clarify what specific allocation data is expected, and what business processes or reporting needs it supports?

    The HRIS must maintain historical employee allocation data, which is the State fund from which the employee has been paid; the data maintained shall include prior allocations and effective dates along with any other relevant data requested by the Treasurer. Historical data should be retained when allocation changes occur to support payroll, budgeting, auditing, reconciliation, and reporting. The system should allow authorized users to view historical allocations and identify changes over time.

31. Section II, Section III.O.1 – Please confirm all current systems that contain HR, timekeeping, benefit-time, performance, recruiting, onboarding, org-chart, payroll, document, and reporting data today by commercial name.

    While the Treasurer must at times also integrate with statewide systems over which it has no direct control, please see the response to Question #10 and refer to specific items listed in the RFP itself (e.g. JazzHR).

32. Section III.M.1 – The RFP references multi-user capability for "up to 270 users workstations." Please confirm the total number of employees defined by full-time, part-time, contingent or contract workers currently and 3-year projected.

    Please see the repsonse to Question #5. The Treasurer does not have an available projection to provide.

33. Section III.G.1.m – Please define the “field reports” requirement, including required fields, relationship to time entry, approval workflow, mobile needs, location capture, reporting, and whether field reports affect payroll or labor allocation.?

    This is a comment field that employees use to note time worked at a location other than their regular office or remote (e.g. home) location. For example, employees may note attendance at a conference.

34. Sections III.G.1.a–c, Section III.L.4 – Does ISTO currently use physical time clocks or any third-party time-capture devices? If yes, should they be retained and integrated?

    Please see the response to Question #12. ADP provides a system through which Treasurer employees use automatic or manual time entries; the HRIS should provide similar functionality which need not be an ADP, Inc. product.

35. Appendix B, Objective 12 – Please identify the intended employee populations, locations, business use cases, and privacy constraints.?

    For the total intended employee population, please see the response to Question #5. The majority of Treasurer employees are based in Chicago and Springfield; however, staff are also located in Marion, Rock Island, Champaign, Rockford, Peoria and Collinsville. The Treasurer does not at this time have specific business use cases or privacy constraints, specific to this RFP, to share.

36. Appendix B, Objective 9 – Please clarify whether “employee fiscal forecasting” means operational reporting, salary and vacancy forecasting, labor-cost forecasting, budget-versus-actual reporting, scenario modeling, or formal workforce planning.

    “Employee fiscal forecasting” refers primarily to the ability to generate future-dated operational reports and calculate projected employee-related costs based on the current information maintained in the HRIS. This may include employee status, positions, salaries, and other relevant compensation data. The expectation is that the HRIS can use the current data on record to calculate and report projected workforce costs for a specified future date or period, rather than requiring a separate formal workforce planning or scenario modeling capability.

37. Please confirm the number of unions or bargaining agreements you have.

    Please see the response to Question #16.

38. Appendix B, Objectives 1.A–1.B – Please confirm whether a dedicated customer tenant with logical data isolation, ISTO-controlled security, and no access for other Illinois agencies or constitutional offices satisfies the requirement that HR data be stored separately and that shared instances not exist.

    The Treasurer reserves the right to review all Respondent or Contractor controls prior to accepting them.

39. Appendix B, Objective 1.B – Please define "shared instances" in Appendix B. Is ISTO requiring physical single-tenant infrastructure, or is logical tenant isolation acceptable?

    The Treasurer is seeking one system to handle employee data, reporting and timekeeping.

40. Appendix B, Objectives 2.A–2.B – Please identify any non-ISTO personnel who may require access to HR data, including CMS payroll users, auditors, implementation partners, technical support, contractors, or State IT personnel.

    No Treasurer employees or contractual employees have access to the current system, and there are no current plans for any such access to the HRIS.

41. Appendix B, Objective 3 – Please confirm whether SOC 1 Type II and SOC 2 Type II reports satisfy the stated "SOC1/2 audit certifications" requirement, and whether any other certifications or third-party security assessments are required.

    Yes, they will satisfy the requirement.

42. Section III.O.1 – Please provide estimated record counts, file formats, data quality information, and retention periods for data conversion from TOMS, EMS, JazzHR, OrgChart, CMS Payroll, SharePoint, and any other current systems.

    The Treasurer expects data conversion from TOMS, EMS, JazzHR, OrgChart, CMS Central Payroll, SharePoint, and other applicable current systems. Estimated record counts, file formats, data quality, and retention periods will be determined during the implementation and discovery phase in coordination with the Treasurer and the Contractor. Historical data requirements will be based on applicable business, operational, audit, and records retention needs. The Treasurer expects the Contractor to support common data formats, including CSV, Excel, and other standard export formats available from the source systems.

43. Sections III.E.2, III.H.1.a, III.J, III.K.3, and III.O.1 – Please specify how much historical timekeeping, leave, employee master, salary, union, evaluation, applicant, onboarding, document, and audit data must be converted into the new HRIS.

    The Treasurer would require ten (10) years of historical data to be converted to the HRIS; however, the Treasurer may consider additional years consistent with its records retention requirements.

44. Section VI.C – Please confirm whether ISTO prefers subscription, implementation, integration, conversion, training, travel, optional modules, and ongoing support to be shown as separate line items in the cost proposal.?

    Respondents may, but are not required to, provide separate line items for the above items; Respondents may alternatively propose all-encompassing monthly or other rates that address all Services.

45. Section VI.C – Please confirm how ISTO wants costs separated across State Fiscal Year 2027 and the next two fiscal years, given that the required pricing schedule must cover a four-year period?

    The Treasurer anticipates a new Agreement will be in place effective starting in February 2027. Accordingly, there should be costs included for the period February through June 2027, then State Fiscal Years 2028 through 2030, then the period from July 2030 through January 2031.

46. Section IV.A, Section V.B–C – Please clarify the finalist interview format, expected attendees, time limit, demonstration requirements, use cases, and scoring method.

    In the event the Treasurer determines interviews necessary, it will at that time determine the format that best meets its needs.