



**Competitive Sealed Proposal
for
UKG Pro Workforce Management Alignment with Workday**

**Event # 1068
Bid Specifications**

The MetroHealth System

OPEN DATE: 10/13/2026 at 8:00am ET

CLOSE DATE: 10/26/2026 at 1:00pm ET



Contents

I. INTRODUCTION & STATEMENT OF PURPOSE	4
About The MetroHealth System	4
Statement of Purpose and Engagement Objective	5
Definition of Success	5
II. Scope of Services	5
Overall Scope	5
III. Project Management	9
IV. Applications and Environment in Scope	9
Advanced Scheduling Remediation and Reimplementation	10
V. Integrations in Scope	11
Integration Delivery Requirements.....	12
VI. Functional Workstreams.....	13
Business Structure and Organizational Alignment	13
Timekeeping.....	13
Accruals and Leave.....	13
Advanced Scheduling	13
Attendance	13
Devices and Mobile	14
UKG Security assignments	14
Physician and Non-HR Manager Access.....	14
VII. Data Architecture, DataHub, Enterprise Data Warehouse, and Governance	14
Future-State Architecture	14
DataHub and Embedded Analytics	15
Data Governance	15
VIII. Reporting and Analytics	17
IX. Testing, Quality, and Payroll Assurance.....	18
X. Change Management, Training, and Knowledge Transfer	19
XI. Cutover, Go-Live Readiness, and Stabilization	19



XII. Respondent Qualifications and Staffing	20
XIII. Proposal Response Requirements	21
Pricing Requirements	21
XIV. Security, Privacy, Compliance, and Commercial Requirements	22
Protected Information	22
Third-Party Risk	22
Subcontracting	22
Offshoring.....	22
Conflicts of Interest:.....	22
Insurance and Contracting	23
Work Product and Knowledge Transfer.....	23
Auditability	23
XV. Timeline and Critical Dates	23
XVI. Evaluation Criteria	24
IV. ATTACHMENTS.....	24



I. INTRODUCTION & STATEMENT OF PURPOSE

About The MetroHealth System

The MetroHealth System (“MetroHealth”) is redefining health care by going beyond medical treatment to improve the foundations of community health and well-being: affordable housing, a cleaner environment, economic opportunity and access to fresh food, convenient transportation, legal help and other services. The system strives to become as good at preventing disease as it is at treating it.

The system’s more than 600 doctors, 1,700 nurses and 7,800 employees go to work each day with a mission of service, to their patients and to the community. As Cuyahoga County’s safety-net health system, MetroHealth plays an essential role in the region, caring for anyone and everyone, regardless of an ability to pay.

Founded in 1837, MetroHealth operates four hospitals, four emergency departments and more than 20 health centers and 40 additional sites throughout Cuyahoga County. The system serves more than 300,000 patients, two-thirds of whom are uninsured or covered by Medicare or Medicaid.

MetroHealth is home to Cuyahoga County’s most experienced Level I Adult Trauma Center, verified since 1992, and Ohio’s only adult and pediatric trauma and burn center.

As an academic medical center, MetroHealth is committed to research and to teaching and training tomorrow’s caregivers. Each active staff physician holds a faculty appointment at Case Western Reserve University School of Medicine. Its main campus hospital houses the Cleveland Metropolitan School District’s Lincoln-West School of Science & Health, the only high school in America located inside a hospital.

Knowing that good health is about much more than good medical care, MetroHealth has launched the **Institute for H.O.P.E.**™ (Health, Opportunity, Partnership, Empowerment), which uses a coordinated, collaborative and strategic approach to help patients with non-medical needs such as healthy food, stable housing and job training.

The MetroHealth Glick Center, a new 11-floor hospital, on the system’s main campus in Cleveland welcomed its first patients in October 2022. The billion-dollar project is the cornerstone of a wider neighborhood revitalization effort led by the system and its partners in the community.

For more information, visit metrohealth.org.



Statement of Purpose and Engagement Objective

MetroHealth requires professional services to align its existing UKG Pro Workforce Management (Pro WFM) environment with the future-state Workday ERP. The engagement will address the organizational, functional, technical, integration, data, reporting, testing, change, training, cutover, and stabilization impacts created by replacing Infor/Lawson as the source for human resources and payroll data.

MetroHealth seeks a partner with demonstrated healthcare experience and deep expertise across UKG Pro WFM, Workday HCM and Payroll, Boomi integrations, workforce data architecture, DataHub, enterprise data warehousing, reporting, and complex payroll validation.

Definition of Success

Success for MetroHealth at the January 2028 go-live includes:

- A safe and stable Workday go-live.
- Accurate and timely payroll processing.
- Validated end-to-end integrations and reconciled data.
- Effective change management and training.
- Successful knowledge transfer to internal MetroHealth support teams.

Post-go-live optimization of Workforce Management capabilities is anticipated as a Phase 2 effort. Respondents should distinguish required go-live work from optional Phase 2 optimization recommendations.

II. Scope of Services

Overall Scope

MetroHealth is implementing Workday as its future-state Human Capital Management (HCM), Payroll, and Enterprise Resource Planning (ERP) platform and requires comprehensive services to redesign, align, configure, integrate, test, and deploy UKG Workforce Management in support of the future-state organizational, operational, payroll, labor management, financial, and reporting environment.

The Respondent shall provide all professional services, project management, functional consulting, technical consulting, configuration, integration development, reporting services, testing support, and production deployment services required to transform MetroHealth's UKG Workforce Management environment to align with Workday and the future-state operating model.

Services shall include, but are not limited to, the following:

- Review, assess, rationalize, and redesign workforce management business structures, organizational hierarchies, labor structures, employee assignment models, and operational configurations.
- Rebuild and reconfigure UKG business structures to align with Workday Supervisory Organizations, Companies, Cost Centers, Locations, Employee Groups, Worktags, and other future-state organizational and financial dimensions.
- Reconfigure organizational sets, labor category profiles, labor category entries, manager assignments, supervisory relationships, security inheritance models, and related workforce management configurations.
- Assess, map, migrate, and validate employee assignments, labor allocations, organizational relationships, supervisory assignments, and workforce management data required to support future-state business operations.
- Develop and execute a migration and validation strategy to transition workforce management structures and employee assignments while preserving business continuity, payroll accuracy, scheduling functionality, and reporting integrity.
- Conduct a comprehensive impact assessment of all affected UKG components, including:
 - Timekeeping
 - Advanced Scheduling
 - Accruals and Leave Management
 - Attendance
 - Mobile Applications
 - Embedded Analytics
 - DataHub
 - Integrations and Interfaces
 - Reporting and DataViews
 - Security and Access Controls
 - Payroll-Related Functionality
- Reconfigure timekeeping policies, pay rules, work rules, labor allocations, labor levels, employee groups, and related workforce management configurations impacted by the Workday implementation.
- Assess, redesign, and configure accrual plans, leave programs, attendance policies, and supporting business processes.
- Review, redesign, optimize, and configure Advanced Scheduling functionality, scheduling hierarchies, staffing rules, shift templates, coverage requirements, and related dependencies.
- Design, develop, test, implement, and document all required integrations between UKG, Workday, and other impacted enterprise applications.

- Assess and remediate impacts to existing inbound, outbound, real-time, batch, and file-based interfaces resulting from changes to organizational structures, foundational data models, master data ownership, and business processes.
- Inventory, assess, rationalize, redesign, and rebuild all impacted reporting assets, including:
 - UKG Reports
 - DataViews
 - Embedded Analytics
 - Payroll Reports
 - Scheduling Reports
 - Attendance Reports
 - Compliance Reports
 - Productivity Reports
 - Labor Reports
 - Dashboards
 - Automated Report Distributions
- Align all reporting assets with future-state business structures, departments, cost centers, locations, labor structures, supervisory organizations, and security models.
- Review and configure Embedded Analytics, DataHub, and workforce reporting solutions to support future-state reporting and analytics requirements.
- Assess workforce, payroll, labor, scheduling, operational, and financial reporting requirements and provide recommendations for long-term reporting governance and reporting architecture.
- Provide recommendations and implementation guidance for integration with MetroHealth's enterprise data warehouse and enterprise reporting ecosystem.
- Develop a Future-State Workforce and Financial Data Architecture documenting:
 - System ownership
 - Systems of record
 - Authoritative data sources
 - Data governance responsibilities
 - Integration points
 - Data flows and synchronization methods
 - Reporting environments
 - Data retention and historical reporting considerations
- Develop and execute comprehensive testing activities, including:
 - Unit Testing
 - System Integration Testing
 - Regression Testing

- User Acceptance Testing
 - Payroll Parallel Testing
 - Reporting Validation Testing
 - Cutover Testing
 - Production Readiness Validation
- Develop and execute cutover activities, deployment plans, go-live readiness assessments, production migration procedures, and post-production stabilization support.
- Provide project management, governance, risk management, issue management, status reporting, stakeholder coordination, and program integration services in partnership with MetroHealth's ERP Program, Workday implementation partner, and internal project teams.
- Define payroll success criteria, acceptable variance thresholds, reconciliation sign-off requirements, and issue escalation procedures.
- Deliver a complete legacy-to-future organizational mapping workbook including historical and future-state values for departments, cost centers, labor categories, employee groups, locations, manager structures, and reporting hierarchies.

The Respondent shall deliver a fully configured, integrated, tested, documented, and operational UKG Workforce Management environment that is aligned with MetroHealth's future-state Workday ecosystem, workforce management strategy, organizational design, payroll processes, financial structure, reporting requirements, and long-term operational objectives.

III. Project Management

The selected respondent will lead project coordination for the UKG workstream while collaborating with the MetroHealth Project Manager and the broader Workday program governance structure.

- Lead UKG project coordination and facilitate recurring workstream meetings.
- Collaborate with the MetroHealth Project Manager to develop and maintain an integrated project schedule.
- Coordinate respondent, UKG, Workday, MetroHealth, and third-party project deliverables and resources.
- Create and maintain the detailed project plan, resource plan, budget tracking, RAID log, issue log, decision log, dependency log, deliverable register, testing plan, cutover plan, and stabilization plan.
- Provide weekly status reporting covering accomplishments, upcoming work, scope, schedule, budget, risks, issues, decisions, dependencies, and leadership escalations.
- Integrate UKG milestones with Workday design, build, test, payroll parallel, deployment, and go-live milestones.
- Apply formal scope and change-control processes.
- Define acceptance criteria and obtain MetroHealth approval for major deliverables.

Respondent requirement: Describe the proposed project methodology, governance model, phase gates, schedule management approach, escalation process, status reporting, and quality controls. Include a sample project plan and sample status report.

IV. Applications and Environment in Scope

Application / Component	Entitlement or Quantity
Timekeeping	Approximately 9,800
Advanced Scheduling	Approximately 400 users across 13 departments
Accruals	Approximately 9,800
Attendance	Approximately 9,800
Analytics (Core) with DataHub	Approximately 9,800
Mobile	Approximately 9,800
Boomi Integrations	17 integrations
Universal Device Manager	Approximately 100 InTouch DX clocks

Quantities are planning estimates and are subject to validation during discovery. Respondents must identify pricing assumptions, quantity thresholds, and any impact if actual counts differ.

Advanced Scheduling Remediation and Reimplementation

- Validate all scheduling profiles.
- Validate scheduler access by department.
- Rebuild organizational assignments.
- Validate employee eligibility and qualification rules.
- Validate skills and certifications integration.
- Rebuild schedule groups.
- Rebuild workload planner relationships.
- Validate self-scheduling.
- Validate shift bidding.
- Validate shift swaps.
- Validate open shifts.
- Validate float pools.
- Validate location reassignment workflows.
- Validate manager approval processes.

Respondent Requirement: Provide estimated effort by department and identify all assumptions regarding scheduling rebuild activities across approximately 13 departments and 400 Advanced Scheduling users.

V. Integrations in Scope

#	Integration	Source	Target	Purpose / Notes
1	Person Import	Workday HCM	UKG Pro WFM	Worker demographic, employment, assignment, and effective-dated data
2	Payroll Export	UKG Pro WFM	Workday Payroll	Time, pay code, labor allocation, and payroll results required by Workday Payroll
3	Cost Center Import	Workday	UKG Pro WFM	Future-state cost centers and descriptions
4	Labor Category Entries Import	Workday	UKG Pro WFM	Labor category values
5	Labor Category Entry List Import	Workday	UKG Pro WFM	Labor category entry lists
6	Labor Category Profile Import	Workday	UKG Pro WFM	Labor category profiles and assignments
7	Business Structure Import	Workday	UKG Pro WFM	Future-state business structure
8	Organizational Set Import	Workday	UKG Pro WFM	Organizational sets and user assignments
9	Employee Group Import	Workday	UKG Pro WFM	Employee groups and assignments
10	Accrual Balance Export	UKG Pro WFM	Workday Payroll	Accrual balances required by payroll and employee processes
11	Census Import	Epic, retrofitted for Workday future state	UKG Pro WFM	Census and related organizational mappings
12	Skills and Certifications Import	Workday HCM	UKG Pro WFM	Skills, certifications, effective dates, and status
13	Manager Import Integration	Workday	UKG Pro WFM	Automated assignment of Manager and Editor security roles
14	Delegation Profile Update	UKG Pro WFM	UKG Pro WFM	Internal delegation profile updates
15	QGenda Schedule Import	QGenda	UKG Pro WFM	Schedule information
16	AcuityPlus Schedule Export	UKG Pro WFM	AcuityPlus	Schedule information
17	AcuityPlus Timecard Totals Export	UKG Pro WFM	AcuityPlus	Timecard totals

Integration Delivery Requirements

- Confirm the future-state pattern, frequency, sequencing, orchestration, protocol, file/API format, security, encryption, monitoring, alerting, retention, restart, and recovery requirements for each integration.
- Produce a functional specification, technical specification, mapping workbook, data dictionary, transformation rules, error-handling design, control totals, reconciliation design, test evidence, deployment plan, runbook, and support handoff for each integration.
- Develop and unit test all changes required for the 17 integrations, including source-system replacement and structural redesign impacts.
- Coordinate Workday-side, UKG-side, Epic-side, QGenda-side, AcuityPlus-side, and middleware responsibilities.
- Design idempotency, duplicate prevention, effective dating, late-arriving data, retroactive changes, correction handling, and auditability.
- Provide operational monitoring dashboards or reports and documented support procedures.
- Identify licensing, environment, connector, API, tenant, and third-party dependencies.

Respondent requirement: For each integration, provide estimated effort, delivery approach, assumptions, dependencies, responsible roles, reusable assets, and whether pricing is fixed fee or time and materials.

VI. Functional Workstreams

Business Structure and Organizational Alignment

- Assess the current UKG business structure and its dependencies on Infor/Lawson.
- Design and configure the UKG future-state structure aligned to Workday organizations, positions, jobs, cost centers, locations, labor categories, manager hierarchy, security, scheduling, and reporting.
- Develop legacy-to-future crosswalks and conversion/loading procedures.
- Validate transfers, secondary jobs, floating, alternate assignments, labor allocation, grants/projects, and overtime charging.

Timekeeping

- Assess and modify pay rules, work rules, pay codes, rounding, differentials, on-call/callback, alternate rates, attestation, meal deductions, historical corrections, prior-period adjustments, approval workflows, and payroll close processes affected by Workday.
- Validate employee assignments, labor transfers, costing, and payroll export behavior for all material scenarios.

Accruals and Leave

- Assess ownership of balances and rules across Workday and UKG.
- Reconfigure accrual profiles, policies, grants, deductions, carryover, limits, leave-related time codes, balance exchange, and reconciliation.
- Define conversion, opening balance, parallel validation, and cutover requirements.

Advanced Scheduling

- Assess impacts to departments, jobs, skills, certifications, manager hierarchy, employee groups, organizational sets, security, schedule groups, self-scheduling, shift swapping, open shifts, overtime assignment, and interfaces.
- Update configuration and validate scheduling processes across approximately 13 departments.

Attendance

- Assess attendance policy dependencies on Workday-sourced employee attributes and organizational changes.
- Update assignment logic, policies, actions, reporting, and testing as required.

Devices and Mobile

- Validate the effect of new worker, job, location, business structure, security, and authentication data on mobile access and approximately 100 InTouch 9100/DX clocks.
- Update device configuration and deployment documentation where impacted.

UKG Security assignments

- Review all manager roles.
- Review all editor roles.
- Review all scheduler roles.
- Review all administrator roles.
- Review delegated access.
- Review physician access.
- Review organizational-set security.
- Review DataHub access.
- Review Analytics permissions.

Respondent Requirement: Provide a complete UKG security retrofit methodology and identify all role redesign, testing, migration, and validation activities.

Physician and Non-HR Manager Access

- Support manager self-service access for physician leaders.
- Support managers who may not have traditional employee supervisory relationships.
- Support matrix management structures.
- Support delegated manager access.
- Support department administrator access.
- Support security auditing of physician access.

Respondent Requirement: Describe how physician leaders, medical directors, and delegated administrative personnel will be granted, maintained, audited, and validated for workforce management access.

VII. Data Architecture, DataHub, Enterprise Data Warehouse, and Governance

Future-State Architecture

The selected respondent shall develop a Future-State Workforce and Financial Data Architecture that identifies authoritative systems, data ownership, integration points, data movement, transformation, storage, retention, security, and reporting environments across



Workday, UKG Pro WFM, Epic, QGenda, AcuityPlus, middleware, DataHub, and MetroHealth enterprise analytics platforms.

- Current-state and future-state logical and physical data-flow diagrams.
- Develop and maintain a Future-State System Ownership Matrix identifying for each workforce and payroll data element:
 - System of Record
 - System of Entry
 - Integration Source
 - Integration Target
 - Reporting Source
 - Business Owner
 - Technical Owner
- Data lineage from Workday and UKG source transactions through integrations, DataHub, the enterprise data warehouse, semantic layers, and reports.
- Recommendations for ingestion patterns, data latency, history, effective dating, slowly changing dimensions, reconciliation, control totals, and audit trails.
- Recommendations for workforce and financial conformed dimensions, including worker, position, job, department, cost center, supervisory organization, location, labor category, pay code, schedule unit, project/grant, and manager hierarchy.
- Recommendations for historical Infor/Lawson and UKG data retention, archive access, regulatory/audit support, and longitudinal reporting.
- An implementation roadmap distinguishing go-live-critical data work from Phase 2 optimization.

DataHub and Embedded Analytics

- Assess current and future UKG Analytics and DataHub requirements.
- Design UAT and production connectivity, pipelines, refresh schedules, monitoring, reconciliation, security, and support procedures.
- Map pay codes and other WFM dimensions required for productivity, payroll, staffing, attendance, and labor reporting.
- Identify delivered analytics, Dataviews, and reports that can replace custom or enterprise reports.

Data Governance

- Create a governance model with named business ownership, technical ownership, and data stewardship roles by subject area.
- Create a critical data element catalog, business glossary, data dictionary, and naming standards.



- Define data-quality rules, thresholds, exception management, remediation ownership, certification, and sign-off.
- Define change governance for future Workday and UKG structural changes, reference data, mappings, integrations, reports, and security.
- Define access, privacy, retention, classification, and audit requirements for workforce and payroll data.
- Establish data issue triage and escalation procedures for production support.

Respondent requirement: Describe the proposed enterprise data warehouse architecture recommendations, including DataHub integration, conformed dimensions, history, lineage, data quality, governance, security, and ongoing operating model. Clearly identify deliverables and assumptions.

VIII. Reporting and Analytics

The Respondent shall assess, rationalize, redesign, and rebuild MetroHealth's workforce management reporting environment to align with the future-state organizational structure, business processes, security model, and Workday-driven foundational data model.

Services shall include:

- Inventory all UKG, Infor/Lawson-dependent, custom, operational, payroll, scheduling, attendance, accrual, finance, and workforce reports impacted by the transition.
- Classify reporting assets as retain, retire, replace with delivered functionality, rebuild in UKG, rebuild in Workday, rebuild in the enterprise data warehouse, or defer to a future phase.
- Define the appropriate reporting platform for each use case based on reporting requirements, data latency, historical access, security, performance, ownership, and audience.
- Rationalize, redesign, and validate reports, DataViews, dashboards, analytics, extracts, interfaces, reconciliations, and executive reporting required for go-live and ongoing operations.
- Align all reporting assets to future-state business units, departments, cost centers, locations, supervisory organizations, employee groups, and related organizational hierarchies.
- Define KPI calculations and reconcile metrics across UKG, Workday, Payroll, Finance, and the enterprise data warehouse.
- Provide report specifications, source-to-report lineage, security design, testing documentation, test results, and end-user documentation.
- Provide knowledge transfer and administrative documentation for UKG Reporting, DataViews, Analytics, DataHub, and ongoing reporting support.
- Deliver a report catalog including:
 - Report Name
 - Business Owner
 - Audience
 - Report Platform
 - Source System
 - Frequency
 - Security Model
 - Go-Live Status

Respondent Requirements

Provide:

- A proposed approach for reporting inventory, rationalization, redesign, and rebuild activities.
- A sample reporting inventory and rationalization methodology.
- The number of reports, DataViews, dashboards, analytics, and related reporting assets included in the base fee.
- Pricing and rate schedules for additional reporting assets beyond the proposed scope.
- Sample report catalog.

Respondent Response Requirements

1. Methodology for inventorying, rationalizing, and rebuilding UKG reporting assets.
2. Experience rebuilding UKG reports, DataViews, dashboards, and analytics during ERP implementations, organizational restructures, or mergers.
3. Their approach for validating report accuracy, security, and business continuity during transition.
4. Estimated effort, timeline, assumptions, and resource requirements.
5. Recommended best practices for reducing long-term reporting complexity, support effort, and technical debt.

IX. Testing, Quality, and Payroll Assurance

- Develop an integrated test strategy covering unit testing, integration testing, system integration testing, regression testing, security testing, performance/volume testing, user acceptance testing, payroll parallel testing, cutover rehearsal, and production validation.
- Define entry/exit criteria, environments, data requirements, test cycles, roles, defect severity, defect workflow, traceability, evidence retention, and sign-off.
- Create and maintain traceability from requirement to design, configuration, integration, report, test case, result, defect, and approval.
- Validate end-to-end hire, change, transfer, secondary job, manager change, organizational change, leave, termination, rehire, schedule, time capture, correction, accrual, payroll, costing, and reporting scenarios.
- Perform payroll reconciliation from timecard through Workday Payroll, including record counts, hours, pay codes, dollars where available, labor distributions, exceptions, rejects, corrections, and control totals.
- Provide automated testing recommendations and clearly identify any tools or additional licenses.
- Support go/no-go readiness assessments and document unresolved risks and approved workarounds.

Respondent requirement: Describe the proposed testing methodology, number of included cycles, payroll parallel approach, reconciliation method, defect management process, test automation options, and MetroHealth resource requirements.

X. Change Management, Training, and Knowledge Transfer

- Assess stakeholder and role impacts resulting from Workday-sourced data, new organizational structures, manager hierarchy, application changes, integrations, reporting, and support processes.
- Develop an integrated change management and communication plan aligned with the Workday program.
- Develop role-based training for employees, managers/editors, schedulers, payroll, HR, application administrators, integration support, reporting/data support, and service desk personnel.
- Provide reusable training materials, job aids, process flows, FAQs, recordings, administrator guides, and support runbooks in editable formats.
- Use knowledge-transfer checkpoints throughout design, build, test, cutover, and stabilization, not only at project close.
- Demonstrate MetroHealth support-team readiness through hands-on administration, shadowing, reverse-shadowing, and documented competency or acceptance criteria.
- Develop a detailed cutover responsibility matrix identifying MetroHealth, Respondent, Workday partner, UKG, and third-party responsibilities for each cutover activity.

Respondent requirement: Provide the change management, training, and knowledge-transfer approach, deliverables, delivery formats, assumptions, and ownership model including a cutover responsibility matrix.

XI. Cutover, Go-Live Readiness, and Stabilization

- Develop and maintain a detailed UKG cutover plan integrated with the Workday enterprise cutover plan.
- Plan configuration freeze, final source extracts, reference-data loads, employee loads, accrual balance activities, manager/security assignments, integration activation, device validation, report validation, and payroll readiness.
- Conduct at least one cutover rehearsal and document durations, dependencies, defects, decisions, and lessons learned.
- Develop rollback, contingency, downtime, manual processing, and reconciliation procedures.
- Provide defined coverage during cutover and January 2028 go-live.
- Provide post-production stabilization support with daily triage initially and a structured transition to MetroHealth support.



- Provide stabilization metrics, open-item ownership, knowledge capture, and exit criteria.
- Provide optional pricing for extended managed services and Phase 2 optimization.

Respondent requirement: Provide a staffing and coverage model for cutover and stabilization, including onsite/remote assumptions, hours of coverage, escalation paths, service levels, duration, and transition criteria.

XII. Respondent Qualifications and Staffing

Respondent requirement: Describe experience completing UKG Pro WFM retrofits or redesigns caused by a migration from Infor/Lawson or another HCM/payroll platform to Workday.

Respondent requirement: Provide at least three comparable healthcare references completed within the last five years, including scope, size, applications, integrations, go-live date, and client contact information.

Respondent requirement: Describe experience with UKG Pro WFM Timekeeping, Advanced Scheduling, Accruals, Attendance, Analytics, DataHub, Mobile, Universal Device Manager, InTouch devices, and Boomi integrations.

Respondent requirement: Describe experience with Workday HCM, Workday Payroll, Workday organizational structures, and the Workday Financial Data Model.

Respondent requirement: Describe experience with enterprise data warehouse architecture, data governance, workforce analytics, payroll reporting, and conformed workforce/financial dimensions.

Respondent requirement: Provide biographies and resumes for the proposed Engagement Leader, Project Manager, UKG Solution Architect, Timekeeping/Accruals SME, Advanced Scheduling SME, Attendance SME, Integration Architect/Developers, Data Architect, Data Governance Lead, Reporting/Analytics Lead, Testing Lead, Change Lead, Trainer, and Stabilization Lead.

Respondent requirement: Identify which resources are employees, subcontractors, onshore, offshore, remote, or onsite. MetroHealth approval will be required for key personnel changes.

Respondent requirement: Provide the respondent approach to correcting resource-performance or fit concerns and replacing key personnel without disrupting the project.

XIII. Proposal Response Requirements

1. Executive summary and understanding of MetroHealth objectives.
2. Proposed methodology, phases, work plan, milestones, and integrated timeline.
3. Detailed response to every scope requirement in this RFP.
4. Deliverables list with description, owner, timing, prerequisites, acceptance criteria, and format.
5. Assumptions, dependencies, constraints, exclusions, and client responsibilities.
6. Respondents must submit a detailed assumptions and exclusions workbook. Failure to identify assumptions shall not relieve the Respondent of responsibility for completing the scope described in this RFP.
7. Project organization chart, RACI, staffing plan, resumes, and resource-loading schedule.
8. Detailed approach for integrations, data architecture, EDW, DataHub, governance, reporting, testing, change, training, cutover, and stabilization.
9. Risk register containing the respondent's top project risks and proposed mitigations.
10. Comparable healthcare references.
11. Pricing response and payment schedule.
12. Proposed contract exceptions, subcontractors, offshoring, conflicts, insurance, security, privacy, and supplier diversity information.

Pricing Requirements

- Provide an all-in fee by phase, workstream, deliverable, and resource role.
- Separately identify fixed-fee, time-and-materials, optional, travel, software, licensing, third-party, and contingency amounts.
- Provide role-based hourly rates and estimated hours.
- Provide pricing for each of the 17 integrations and any volume or complexity assumptions.
- Provide pricing assumptions for reports, Dataviews, dashboards, DataHub, EDW advisory, data governance, testing cycles, training assets, onsite support, and stabilization duration.
- Provide a milestone-based payment schedule tied to MetroHealth acceptance of deliverables.
- Identify rate-card validity, annual escalators, not-to-exceed provisions, and change-order rules.
- Provide optional pricing for Phase 2 optimization and extended managed services.



XIV. Security, Privacy, Compliance, and Commercial Requirements

Protected Information

State whether the respondent will create, store, view, maintain, or transmit PII, PHI, payroll, workforce, or other confidential information. Describe safeguards, encryption, access controls, logging, incident response, retention, destruction, and breach notification.

Third-Party Risk

The selected respondent will be required to complete MetroHealth third-party risk assessment activities and remediate identified risks as required.

Subcontracting

Identify all proposed subcontractors, scope, location, data access, certifications, and supplier diversity status.

Offshoring

State whether any services or access to MetroHealth information will occur outside the United States. No offshoring may occur without prior written approval.

Conflicts of Interest:

As a public entity, MetroHealth is subject to Ohio Ethics Laws. Accordingly, as part of our bid process, MetroHealth requests information about relationships and interests you or certain of your employees ("Key Individuals") have with MetroHealth so we can avoid conflicts of interest. Key Individuals include (as applicable): owners, board members, senior leaders, clinicians and anyone involved in decision-making for the potential transaction.

Please ask anyone who qualifies as a Key Individual at your company if they or any immediate family members have either (1) a relationship with MetroHealth or a MetroHealth affiliate serving in the capacity as a Key Individual (e.g., employed as a Key Individual at MetroHealth, member of the MetroHealth Foundation Board of Trustees); or (2) any financial interest that involves MetroHealth or a MetroHealth affiliate (e.g., shared intellectual property (licenses, patents, royalty arrangements), research collaborations, ownership interests, etc.).

In your response to this CSP, please indicate whether your company or any of its Key Individuals and their respective families is a MetroHealth Key Individual or has any financial interest involving MetroHealth or one of its affiliates. If yes, please provide a list with the name and title of each Key Individual and a description of the relationship or financial interest with MetroHealth (e.g., "Jane Doe, President – Spouse, John Doe, serves as a Director on the MetroHealth Foundation"). If neither your company nor any Key Individual or Key Individual's



family member has any relationship or financial interest involving MetroHealth, please state “none.”

Insurance and Contracting

Provide required certificates of insurance, tax documentation, and requested exceptions to MetroHealth’s governing agreement and procurement terms.

Work Product and Knowledge Transfer

Identify ownership and licensing terms for source code, integration components, mappings, specifications, documentation, training materials, reports, custom configurations, and other project work product.

Auditability

Describe how project and production artifacts will support audit, payroll reconciliation, security review, change control, and operational support.

XV. Timeline and Critical Dates

Milestone	Date
RFP released	10/13/2026
Respondent questions due	10/19/2026
MetroHealth responses posted	10/21/2026
Proposals due	10/26/2026
Respondent presentations, if requested	11/2/2026 - 11/20/2026
Notice of intent to award	11/24/2026
Contract execution	tbd
Project kickoff	1/15/2027
Workday / UKG production go-live	January 2028

Respondents must propose a detailed schedule that supports the January 2028 production go-live and explicitly shows dependencies on Workday design, configuration, integration, testing, payroll parallel, and cutover milestones.

XVI. Evaluation Criteria

MetroHealth will include the following factors and criteria when evaluating proposals for this bid:

- Relevant healthcare, UKG, Workday, integration, payroll, data, and reporting experience.
- Quality and completeness of the proposed approach and deliverables.
- Qualifications, availability, and continuity of proposed key personnel.
- Ability to meet the January 2028 timeline and manage cross-program dependencies.
- Strength of testing, payroll assurance, integration controls, data governance, and go-live readiness approach.
- Knowledge-transfer and MetroHealth self-sufficiency approach.
- Commercial value, pricing transparency, risk sharing, and total cost.
- Security, privacy, compliance, supplier diversity, and contract alignment.
- References and demonstrated outcomes on comparable engagements.
- Overall quality and responsiveness of the proposal.

IV. ATTACHMENTS

The following list of documents are incorporated into this CSP as attachments and should be addressed within your Proposal:

- A. Bid Instructions
- B. Bid Specifications
- C. Intent to Bid
- D. MetroHealth IT Architecture and Security RFP Questionnaire (please completed)
- E. Master Purchase Agreement
- F. Business Associate Agreement
- G. Software as a Service Agreement