

**Durham County Proposed Scope of Work**  
**Onboarding 2.0 Implementation**  
**With EC mini-master implementation**

**Submitted by:**

**Simply Staffed LLC**

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### **1. SUMMARY**

Durham County has separated the HCM aspects of their RFP: we would like to help with the hire to retire portion of work. Payroll, benefits and time will remain in SAP for now. We are providing two options: EC mini-master and EC Full implementation, per your request. Please note that only the Full EC implementation will give you the MSS and ESS services that will help solve the pain point that will come as the portal goes away soon.

Scope will be reviewed during a validation workshop. Simply Staffed may consider requested changes to the scope to be a material change and therefore a signed Change Order may be required to accommodate requested changes to the Services.

### **2. INTRODUCTION**

Simply Staffed LLC is a WBENC-certified Woman-Owned Small Business (WOSB) and SAP Silver Partner providing SAP SuccessFactors consulting, HRIT modernization, and workforce transformation services. Our firm helps agencies configure, optimize, and sustain SuccessFactors modules including Recruiting, Onboarding 2.0, Learning, Performance & Goals, and Analytics—all aligned with OPM’s Human Capital Business Reference Model (HCBRM) and the objectives of this modernization initiative.

- Simply Staffed is an SAP Partner with a solid and growing relationship with SAP NS2.
- We are a federal contractor registered on SAM.gov who holds a contract on the GSA MAS.
- We are a registered vendor on the North Carolina eBid portal and have sent the application with COI to purchasing.

Simply Staffed has implemented and optimized federal and public sector clients, including Department of Energy laboratories, UGI Utilities, and the University of Cincinnati, operating in SAP NS2-hosted FedRAMP environments. These projects involved ticket remediation, release management, and system optimization, giving us direct experience supporting secure, compliance-driven HRIT environments.

Simply Staffed offers federal HRIT expertise, functional delivery, and staffing support to advance goals of a centralized, data-driven Core HCM platform that provides hire to retire.

### **3. HIGH LEVEL PROJECT PLAN**

Estimated at 20 weeks for standard scope

(additional workflows, forms, etc will increase the timeline):

- Prepare 3 weeks

- Realize 5 weeks
- Explore 12 weeks
- Deploy 3 weeks
- Hyper-Care 2 weeks

**Implementation Considerations - the following factors will impact the estimate or schedule:**

- Customer’s ability to complete their responsibilities within proposed project timeframe
- Lack of Customer dedicated resources
- Complex rules or business processes
- Business process change requiring significant organizational change management
- Deviation from the defined scope may necessitate additional discovery to validate scope, assumptions and resource requirements
- Dependence on completion of implementation of integrated modules
- Dependence on Employee Central timeline
- Dependence on EC Mini Master if a third party HRIS is in place or if Onboarding is being used as stand-alone.
- Customer is responsible for the content and maintenance of all provided document forms and policies.

**4. TEAM**

Team Member	Role	Hours	Rate	Price
Tracy Webster	Project Manager	65	225	14,625.00
Kris Bland	ONB Lead Consultant	800	180	144,000.00
Yasser Suhail	EC Lead Consultant	200	180	36,000.00
Tracy Webster	RCM Lead Consultant	70	180	12,600.00
Chuck Young	Stories Reporting Analyst*	20	150	3,000.00
<b>Total</b>		<b>1155</b>		<b>210,225.00</b>

\*assuming live with stories.

**5. TEAM MEMBER PROFILES, EXPERTISE AND CERTIFICATIONS**

Tracy Webster, SAP SuccessFactors Recruiting Expert and Project Manager

LinkedIn: <https://www.linkedin.com/in/tracywebster/>

SAP Certified Application Associate - SAP SuccessFactors Recruiting and Marketing – August 2014

SAP Certified Application Professional - SAP SuccessFactors Performance and Goals - August 2014

SAP Certified Specialist - Project Manager - SAP Activate for Agile Implementation Management - July 2021

<https://www.credly.com/users/tracy-webster/badges#credly>

- Over 15 years of SAP SuccessFactors experience working with companies such as SAP NS2, Accenture, PWC, UGI Utilities, three laboratories at The Department of Energy.
- Over 10 years as a Recruiting Management Project Lead
- Dedicated and professional Principal SuccessFactors Consultant, and Project Manager experienced in all aspects of implementation lifecycles across multiple industries, including Federal and State Government, Entertainment & Media, Services, Healthcare, Retail, Utilities, Higher Education, Computer Technology, and Manufacturing. Clients within these industries included a global presence across North America, Europe, and Asia.
- Prior experience on the client side of corporate HR lends itself to operational design and management of functional teams. Workshops and communication with HR stakeholders is much different because I understand the real business challenges and am dedicated to designing systems that feel system even though they are complex.
- Expertise includes: HR Process Design, SuccessFactors Recruiting Management, Marketing and Onboarding, Functional Configuration, Systems Integration and Architecture, Software Implementation Analysis, Configuration and Development, Off-the-shelf Solutions (COTS), Functional Recruitment and strategies to improve Recruiting Metrics that provide true outcomes for HR.

Yasser Suhail, SAP SuccessFactors Employee Central Expert

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LinkedIn: <https://www.linkedin.com/in/ysuhail/>

SAP Certified Application Associate - SAP SuccessFactors Employee Central Core 2023

<https://www.credly.com/badges/ae06712f-bf94-4bf3-bcbd-b6fc7874afd1>

- Over 20 years of SAP software experience working with companies such as IBM, AspireHR, ADP, MetLife, Brooks Brothers, Charles Rivers Labs, etc.
- Over 10 years as an Employee Central Project Lead
- Dedicated and professional Senior SuccessFactors Consultant, SAP HCM Consultant, and Project
- Manager experienced in all aspects of implementation lifecycles across multiple industries, including Federal Government, Entertainment & Media, Services, Pharmaceutical, Retail, Chemicals, Financial Services, Computer Technology, and Manufacturing. Clients within these industries included a global presence across North America, Europe, and Asia.
- Strong management, analytical, and communication skills combined with functional and technical expertise gained through valuable insight from responsibilities as a

team lead and project manager in a series of different implementation scenarios. Skills have been exercised in cases such as mid-stream project QA analysis assignments, project manager, as well as process reengineering opportunities with clients.

- Expertise includes: HR Process Design, SuccessFactors Employee Central, EC Time/Time-off, Project Management, Solution Architecture, SAP Human Capital Management, SuccessFactors Recruiting Management, Marketing and Onboarding, Functional Configuration, Systems Integration and Architecture, Software Implementation Analysis, Configuration and Development, Packaged Software Implementations, Content and Knowledge Management
- Solutions, Self-Service and End-User Facing Implementations, Training and Data Conversion, Training Curriculum Development, etc.

Kris Bland, SAP SuccessFactors Onboarding Expert

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LinkedIn: <https://www.linkedin.com/in/blandkr/>

- Senior SAP HCM Solution Architect with broad experience from the development of system prototypes to integrated enterprise-wide SAP implementations; proven expertise through 20 complete implementation projects from blueprint to Go-Live.
- Experience in configuring SuccessFactors Onboarding, Recruit Marketing (Career Site Builder), Employee Central and SAP Jam, SAP Manager Self Service, Employee Self Service, Personnel Administration, Organizational Management and Enterprise Portal (NetWeaver Admin).
- Over 22 years of SAP experience and over 23 years of experience overall assisting mid-size and Fortune 500 companies across multiple industries to overcome their most difficult functional and technical challenges in SAP HCM, SuccessFactors, and Enterprise Portals.
- Team Lead of up to 15 professionals on multiple global engagements; serves as trainer and subject matter expert for HCM/Enterprise Portal consultants and customers globally, also participates in “emergency” spot assignments; recognized as possessing superior design, configuration, implementation, and team lead abilities.
- Provide leadership and direction to HCM implementation teams and resolves issues to provide deliverables on time and within budget; demonstrates excellent work ethic and quantity of work; dedicated to providing the highest quality work; uses time effectively and efficiently, producing a high volume of meaningful work.
- Provide pre-sales support as needed, including product demonstrations, and attending prospective client calls.

## 6. ONBOARDING

### Core Deliverables:

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Simply Staffed will deliver the following core configuration elements as part of a Standard Onboarding implementation.

**Configuration Scope:**

Simply Staffed team will facilitate the following meetings/work sessions:

- One Remote Onboarding Solution Workshop of up to two days' duration
- One additional Remote of up to two days' duration if needed
- Remote Business process discussions to map desired future Onboarding processes
- Regular team checkpoints/working sessions

Simply Staffed team will configure the following:

**Standard Onboarding:**

- One (1) Global new hire process workflow (U.S. English Only)
- Enable DocuSign or SuccessFactors e-Signature
- New Hire Integration: SF Recruiting Management
- New Hire Integration: SF Employee Central
- Mass Initiation of Onboarding via API
- Five (10) Policy Forms – Read Only
- Five (5) Signature Only Policy Forms
- Five (5) Data Entry Forms
- Forty-Nine (49) Onboarding Standard Email Services notifications
- Thirty (30) Standard Onboarding Business Rules
- Two (2) Onboarding Program that includes Ten (10) Tasks
- Two (2) Custom Tasks to be included in One (1) program
- Six (6) Onboarding Role Base Permission Roles & Groups
- Two (2) Custom Home Page Cards
- Translation provided with Employee Central language package
  - \*Translations not provided for custom Email Notifications or custom forms or policies
- Five (5) hours of training of Customer's Onboarding Administrator
- Enable SAP SuccessFactors Stories in People Analytics. (Must have Identity Authentication System (IAS) and Identity Provisioning System)
  - Analytics Consultant required for report building
- Two (2) Event Reasons based on Employee Central set up.
- Two (2) Cutover & Deployment
- Compliance
  - Australia: Tax File Number Declaration
  - Australia: Superannuation Standard Choice Form
  - New Zealand: KS2 KiwiSaver Deduction Form
  - New Zealand: IR330 Tax Code Declaration
  - New Zealand: IR330C Tax Rate Notification for Contractors

- Spain: Impuesto sobre la Renta de las Personas Físicas
- Canada: Federal and Provincial Primary Tax Withholding forms
- UK: Starter Checklist
- UK: P45-Details of Employee Leaving Work
- US: Federal and State W-4s
- US: I-9 and E-Verify (system integration)
- US: Pennsylvania Residency Certification Form
- US: Work Opportunity Tax Credit (WOTC)

**Additional implementation tasks not included in base scope:**

- Implementation of third party ATS new hire import (This will be a separate scope)
- Implementation of new hire export to a third party HRIS (This will be a separate scope)
- Implementation of Work Zone (Work Zone requires IAS and Onboarding is not supported)
- Implementation of translations for Custom Data Collection fields
- Implementation of additional Customer specific forms and policies
- Configuration of any modules, not mentioned above, other than Onboarding
- Integration to other systems or Modules other than those explicitly listed above

**New Hire Events:**

- Up to 2 New Hire Event Reasons

Import of full employee population is required to ensure all participants in the Onboarding process are available:

- Manager Assignments
- HR Responsible Groups
- Buddy Assignment and Recommended People
- Rehire Functionality

**7. EC MINI MASTER**

EC Mini Master is required if there is a third party HRIS (including SAP ERP) or Onboarding will be used as a stand- alone module. No EC license is required. *Note: Crossboarding and Offboarding not available with EC Mini Master.*

*Note: Customer must implement User Data File and Employee Profile.*

The following portlets will be included:

- PersonInfo
- PersonalInfo
- Employment Info
- JobInfo
- Email Info

- Phone Info
- Home Address
- National ID
- Emergency Contact (can be added for an additional 20 hours).

**New Hire Events:**

- Up to 2 New Hire Even Reasons

**Import of Hiring Managers (used for Buddy and Contact functionality):**

- Up to 1 import of Hiring Managers

**8. RECRUITING REMEDIATION**

The work in recruiting will be limited to additional fields that are needed by onboarding and/or recruiting.

**9. PROJECT MANAGEMENT**

If we all follow the project plan established and update our tasks as directed, we can keep the number of hours to manage the project low. That means we all take a little ownership and the status updates as needed in the project tracker. We plan to use Teamwork. It ties our budget to hours and burn rates and tasks so that we can keep everything on track without spending hours tracking and updating status information. We would rather use that money to pay for your reporting needs.

**10. STORIES REPORT ANALYST**

Depending on the number of reports needed, we may be able to move some project management hours to cover a few simple reports. This is open for discussion.

**NOT IN SCOPE:**

- All data is the sole responsibility of the client.
- Design of PDF Forms is the sole responsibility of the client.
- Any integrations from Successfactors to SAP or other 3<sup>rd</sup> party applications are a client responsibility. We are happy to work with your delegate to give them what they need in support of their integration.
- Testing and test scripts are a client responsibility. Simply Staffed will facilitate and provide guidance. Consultants do unit testing during the iteration before demo to client. Defects will be resolved in the test cycle. Changes will be in the next iteration.

**Additional customer specific configuration (remove or add as needed):**

- Five (5) Customer specific Email Services notifications
- Five (15) Customer specific Document Templates for Signature-only Policies (1 Business Rule is included per policy) (Policies currently stored in ONB 1.0 Employee Portal, which is not supported by ONB 2.0.
- Five (5) Customer specific Document Template forms. (1 Business Rule is included per form)
- Twenty-Five (25) Custom Data Collection fields
- ~~Three (3) Custom Business Rules for the Custom Data Collection~~

- Custom Home Page Tiles and corresponding RBP/Business rules will be needed to replicate existing functionality found in the ONB 1.0 Employee portal.

## Additional Durham Onboarding Requirements

### 1. New Hires

- 1.1 Implement global workflow for new hire processing. (Onboarding 2.0 does not support “workflow’s” of tasks. This would need to be accomplished through custom programs and tasks.
- 1.2 Define event reasons for new hires. This is already covered under standard onboarding.
- 1.3 Enable online and e-signature capabilities. This is covered in standard onboarding and can be removed. The county will use the native E signature in ONB.
- 1.4 Integrate recruiting management for new hires. This is already covered under standard onboarding .
- 1.5 Ensure transfer of employee data, direct deposit details, and tax information from legacy system to new platform. This is additional that is not part of the standard onboarding which is generally just new implementations. The hours for this would be covered by the additional hours.

### 2. Programs & Tasks

- 2.1 Configure approximately three onboarding programs for various operational tasks. (This is additional as only 2 programs are part of the standard scope. The county has mentioned 3 for certain, but a possible 4th might be needed).
- 2.2 Include two custom onboarding tasks. This is already covered under standard onboarding .
- 2.3 Develop home page informational cards for user guidance. (Additional cards will be required to replicate the existing functionality found in ONB 1.0 Employee Portal)

### 3. Emails

- 3.1 Set up around 50 standard email notifications for onboarding activities. This is already covered under standard onboarding .
- 3.2 Provide five additional customized email notifications tailored to specific needs. This will be needed for the additional programs. There are 5 custom emails that are part of the standard package, so this will give them 10 custom emails.
- 3.3 Apply approximately 30 business rules to govern onboarding communication workflows. This is already covered under standard onboarding .

### 4. Data

- 4.1 Import complete employee population into the new system.
- 4.2 Update user IDs during migration from old to new systems.
- 4.3 Migrate records of terminated employees and verify information for new hires.

## 5. Data Collection

- 5.1 Implement five tailored business rules for targeted data collection.
- 5.2 Create up to 10 custom data collection objects (each supporting up to ten fields) and corresponding configuration interfaces. There will be more than 5 additional data collection objects required to support the additional policies noted for the different programs.

## 6. Additional Sub Portals

6.1 Provide access and configuration for the following sub-portals:

- Individual Information This is covered by personal data and can be removed.
- Biographical Data: This is an additional portlet not covered by the standard EC Mini Master and noted in the upper portion of the document.
- Personal Information - **This is covered by personal data.**
- Employment Details - **This is covered by personal data.**
- Job Information - **This is covered by personal data.**
- Email Details - **This is covered by personal data.**
- Phone Contacts - **This is covered by personal data.**
- Residential Address - **This is covered by personal data.**
- National ID - **This is covered by personal data.**
- Emergency Contacts - **This is covered by personal data.**
- Dependent Information - This is an additional portlet not covered by the standard EC Mini Master and noted in the upper portion of the document
- Work Permit Details - This is an additional portlet not covered by the standard EC Mini Master and noted in the upper portion of the document
- Bank Details - This is an additional portlet not covered by the standard EC Mini Master and noted in the upper portion of the document
- Global Information (Disability, Veteran Status, Race/Ethnicity)
- Person Relationship Information
- Work Permit Information - The county mentioned that they won't need to use work permit
- Compensation Information
- Compensation Nonrecurring (Bonus Payments)
- Compensation Recurring (Salary and Bonus Payments)

## 7. Administration

- 7.1 Assign permissions and group roles based on user profiles. - This is already covered under standard onboarding.
- 7.2 Establish basic protocols for data privacy and protection.
- 7.3 Outline onboarding procedures for administrators.

## 8. Reports

- 8.1 Supply report generation tools and features as part of the onboarding suite.

## 9. Documents

- 9.1 Compliance Documentation - This is already covered under standard onboarding .
  - 9.1.1 Federal and State W-4s (US).This is already covered under standard

onboarding .

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9.1.2 I-9 forms and E-Verify (US). This is already covered under standard onboarding .

9.1.3 Pennsylvania Residency Certification Form (US) - This is already covered under standard onboarding.

9.1.4 Disability and Veteran Status Declaration Forms (US) - This is already covered under standard onboarding .

## 9.2 Policy Forms and Templates

9.2.1 Provide five customer-specific policy forms in read-only format.

9.2.2 Offer around fifteen signature-only policy templates for customers.

9.2.3 Supply five customer template forms supporting up to ten fields each.

Foundation Objects that can be included:

- Company (Required)
- Business Unit
- Cost Center
- Division
- Department
- Location (Required)
- Job Classification
- Position (Number Only)