

LEAVE ADMINISTRATION OUTSOURCING PROPOSAL

PREPARED BY

Casey Rillahan

PRESENTED TO

Village of Orland Park



A BIT ABOUT TRÜPP

100%

WOMEN-OWNED BUSINESS

Ranked in OR and SW Washington's Top 50 Women-Owned Businesses.



COMMITTED TO OUR CORE VALUES

Our [five core values](#) are woven tightly into the fabric of Trüpp.



SERVING CLIENTS IN ALL 50 STATES

Experts in multi-state compliance and navigating state and local laws.



PURPOSE DRIVEN

Help our clients' businesses to thrive by offloading and augmenting HR functions.

Leave Administration Services

The following is a description of the leave administration process and activities. As part of the implementation process, Trüpp will establish a process map specific to your business, including defined hand-offs/dependencies. Our dedicated leave administration team will provide a consultative and thorough review of your current leave policies, provide expert recommendations, and come together to implement a best-in-class leave service tailored specifically for your organization. Trüpp will also provide training for managers and HR staff who are interacting with leave-taking employees to educate them on leave policies and best practices. Leave administration activities will need to operate in compliance with current, relevant leave laws, such as:

- Family and Medical Leave Act (FMLA)
- State and Local Family Leave Laws
- Employer Sponsored Leaves
- Employer Approved Personal Leaves
- Military leave
- Jury duty leave
- Emergency responder leave
- Domestic violence leave

Leave Administration Steps

While the process will be further refined based on the unique client needs, below are typical steps of the leave administration process.

Determine Eligibility. Once Trüpp has been notified of an employee who may need to take a protected leave, they will be assigned a leave specialist who will work with them and their supervisor throughout the entire process ensuring clear and consistent communication. After notification, Trüpp will first assess whether the employee meets eligibility requirements. Once eligibility has been determined and within 5 days of leave request, Trüpp will send the employee a Notice of Eligibility and Rights & Responsibility, which states eligibility status and, if applicable, ineligibility reason(s).

If the employee is eligible to take a protected leave, the employee will also be asked to have their medical provider complete a medical certification, if applicable, within 15 days of receiving the Notice of Eligibility and Rights & Responsibility. Typically, certification is not required for employees needing to take parental leave.

Leave Approval + Monitoring. Once Trüpp has received the certification from the employee, Trüpp verifies the certification contains all of the necessary information to determine if the need for leave is for a qualifying reason and the amount of time off that will be required. Within 5 days of receiving complete certification information, Trüpp prepares and provides the employee with a Designation Notice. This notice provides the employee details regarding time off parameters, benefits impact (i.e., medical premium payments), time tracking and other details. Internal payroll and benefit teams are also notified following the approval of the leave.

While our dedicated leave specialist is available to employees throughout the duration of the leave, we commit to contacting the employee to check in at the mid-point of their leave of absence. The employee will be responsible for reporting intermittent leave usage to Trüpp along with updates on length of leave. The employee will need to make sure leave utilization is provided to Trüpp, which is submitted through Trüpp's customized web portal.

If an employee's certification expires and the employee needs an extension or the need for leave has changed, Trüpp will request that the employee complete a recertification. In cases where an intermittent leave has no defined end date, Trüpp will request recertification from the employee periodically (i.e. every six months).

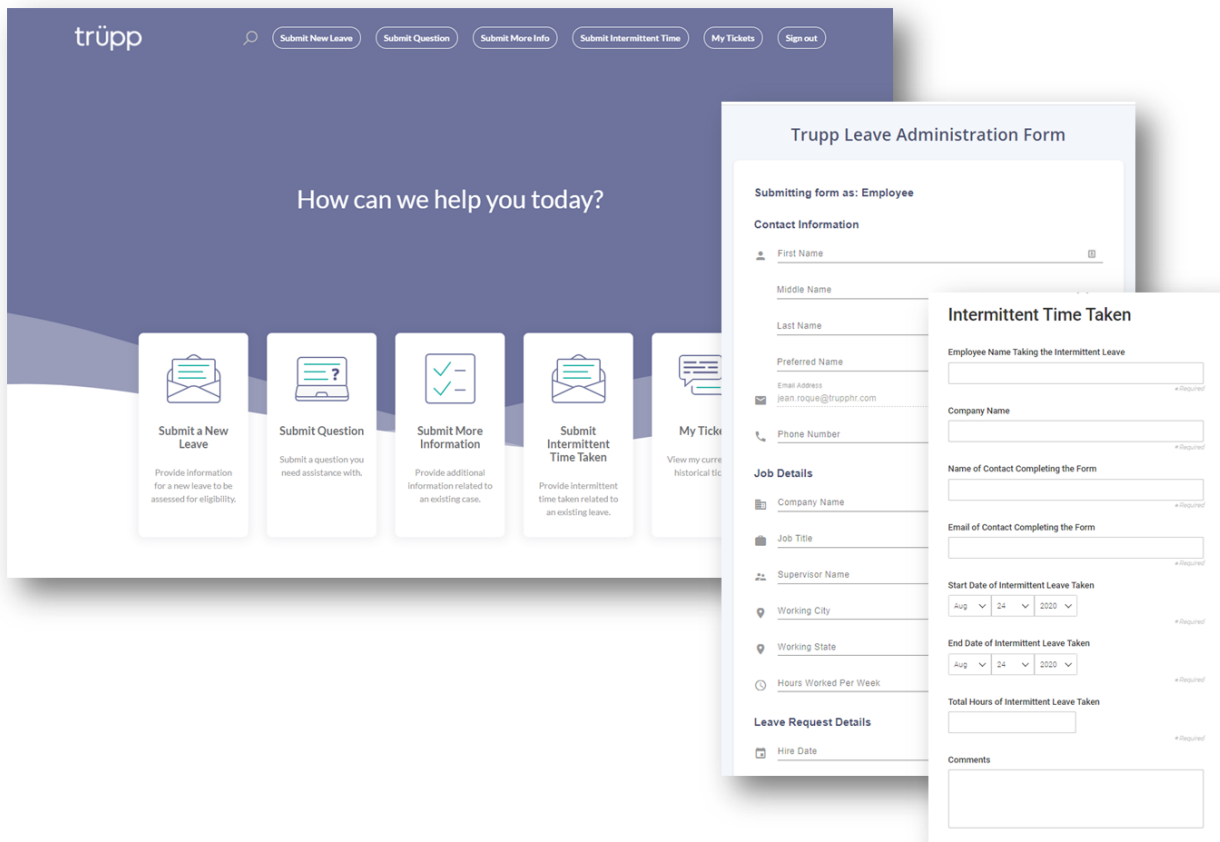
Return to Work. Approximately two weeks before the leave expires, Trüpp will notify the employee of when their leave is ending and will remind the employee of any fitness for duty requirements that need to be met. The leave specialist will also confirm the return to work date with the client. This is also the time that Trüpp will communicate with the employee to see if there are any potential accommodations that need to be considered.

ADA Interactive Process. If it is determined that an accommodation may be needed, Trüpp will request the employee to have their medical provider complete an ADA medical certification. Once the certification is received, Trüpp will meet with the employee to conduct the interactive process in order to gather sufficient information from the employee to provide recommendation to the employer regarding if and what accommodation(s) may be reasonable for the employer to provide. Trüpp will then provide its recommendations to the employer and, following the employer’s review and decision, communicate to the employee the outcome of the interactive process.

Leave administration Tracking + Reporting

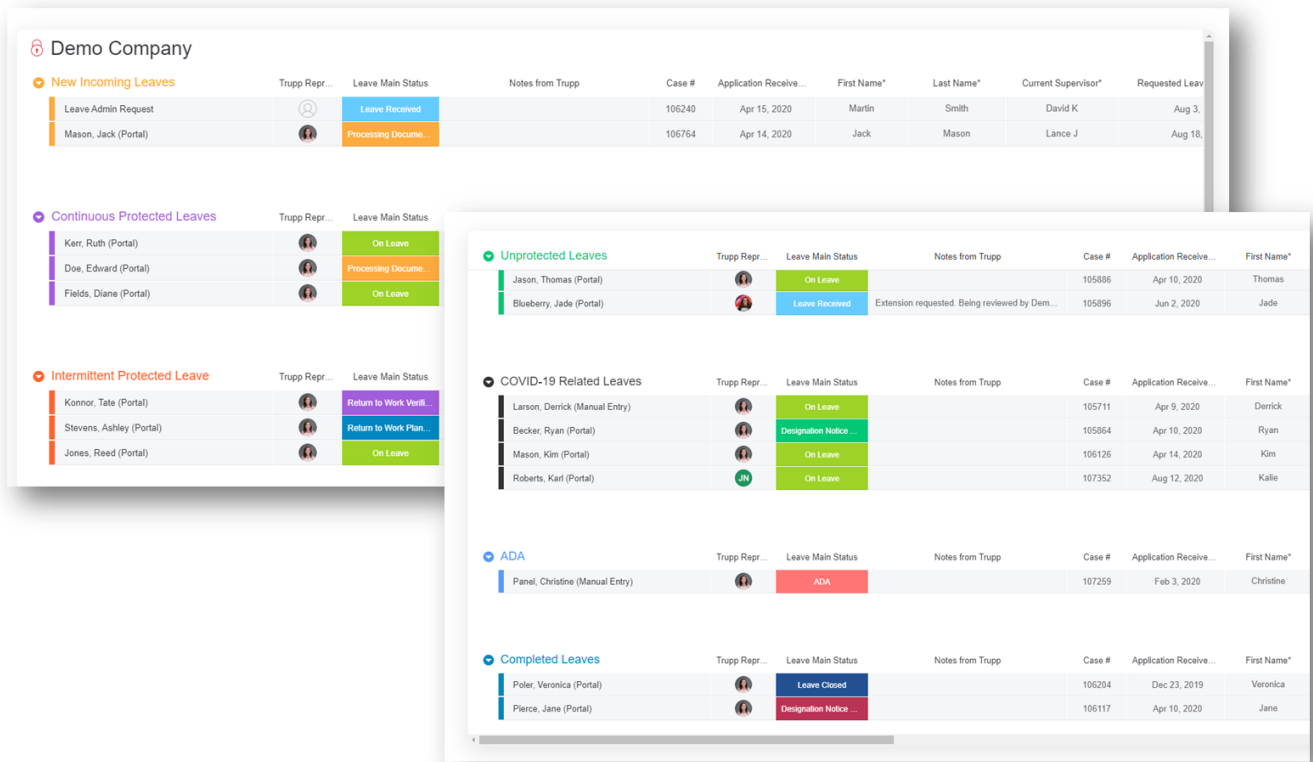
Leave Notification and Updates. Employees and managers can utilize Trüpp’s customized web portal to submit leave requests. Employers are provided with a portal access link that can be easily embedded in your HRIS, your company intranet, or in a company-wide communication to your employees. Is your workforce primarily in the field without access to a company computer? No problem, Trüpp also provides the ability to handle all leave activities through a special leave hotline. Leave requests are acknowledged within four hours (of standard business day) and leave submission automatically triggers a Trüpp representative within our customer service ticketing system. Communications with the employee (and other client contacts, such as the manager and HR) are also tracked in this system—maintaining a secure and confidential record of activities.

[Here is a link to a demonstration of the Trüpp’s leave portal](#) and below are some screen captures.



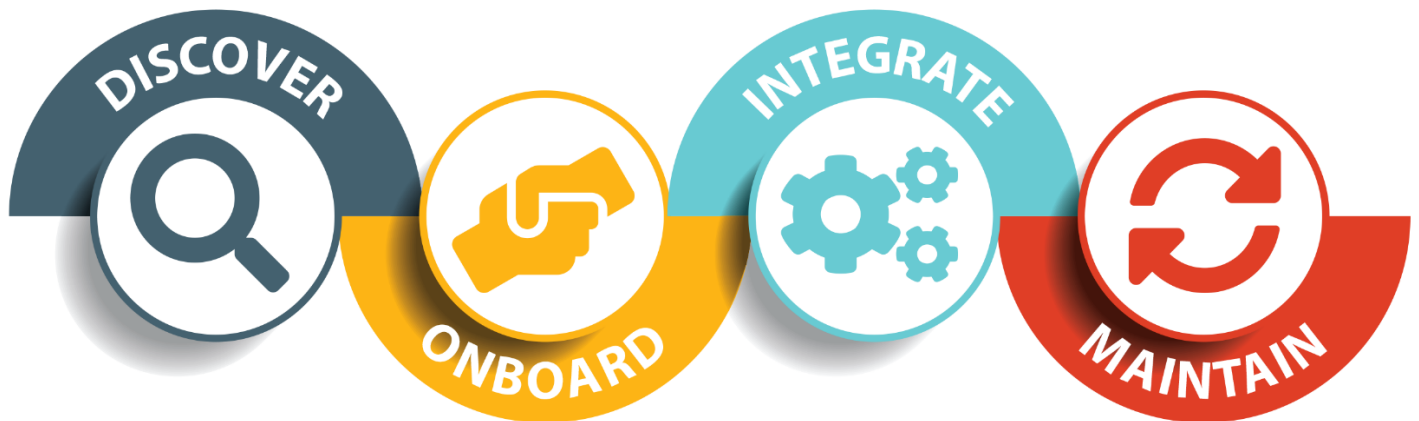
Leave Status Tracking. Want to know who is on leave and what their leave status is? Trüpp has you covered with real-time access to a dashboard containing the current status of each of your organization’s open leaves. You’ll be able to view each employee’s specific type of leave, where they are in the leave process, how much leave time they have available and which dedicated Trüpp advisor is working with them. Trüpp will also provide detailed electronic documentation of leave history for record keeping.

Below are some screen captures of the leave administration dashboard. Details of information tracked and dashboard capabilities can be further shared as a live demo.



Leave Reporting. To help your organization understand leave utilization and identify opportunities for decreasing leave length/occurrences, Trüpp provides helpful reports of leave administration activities that can be utilized for work-force planning and employee forecasting. Examples of standard reporting metrics include:

- Percentage of workforce on leave
- Average leave duration
- Types of leave taken
- Reasons for leave
- Number of leave requests including number of approvals & denials



TRÜPP'S PROVEN PROCESS

DISCOVER

During the exploratory stage, we focus on:

- Understanding how your leave function is currently being supported
- Learning how we can best support your business objectives, management, and workforce
- Identifying areas that may impact transition of services
- Determining which aspects of our service offering or expertise align with your needs
- Providing an explanation of services and pricing

DELIVERABLES:

- Proposal of services and service agreement

INTEGRATE

Once onboarding activities are complete, Trüpp initiates:

- Conducting an assessment to establish a baseline and identify priorities
- Establishing an initial work plan with agreed upon priorities
- Handing off current leaves and associated information to Trüpp, if needed
- Introducing staff to their resources at Trüpp
- Educating managers on how to leverage Trüpp

DELIVERABLES:

- Initial work plan
- Manager training

ONBOARD

Once we have an agreement in place, the next steps include:

- Conducting series of project kick-off and onboarding meetings
- Establishing plan for implementation of services
- Receiving client information needed for transitioning ownership of leave activities
- Establishing a communication plan to introduce Trüpp to your team

DELIVERABLES:

- Client onboarding meetings and transition plan
- Communication plan

MAINTAIN

To ensure priorities maintain alignment with your business, Trüpp will provide:

- Recommended leave policy updates when necessary to adhere with federal, state, or local leave guidelines
- Communication updates to employees and managers with leave policy changes
- Access to leave tracking and reporting data
- Annual service review to reflect on past year, assess opportunities for improvement and service alignment, and update service agreement, if needed

DELIVERABLES:

- Policy & Compliance communication updates
- Annual service review
- Service agreement updates

PRICING

Leave Administration Service	Cost
<p>Leave Administration Services</p> <p>Administration and overall management of the employee leave process with defined points of communication, roles and responsibilities, and process map.</p>	<p>PER LEAVE FEES (LEAVE ADMINISTRATION)</p> <ul style="list-style-type: none"> ◦ \$195/standard leave/per employee PLUS ◦ \$95/intermittent leave/per employee/per month² ◦ \$165/hour for ADA Accommodation Requests/Interactive Process <p>ADMINISTRATION FEES</p> <ul style="list-style-type: none"> ◦ Monthly Base Fee: \$500
<p>Out of Scope HR Services</p> <p>Services can be provide on an hourly basis or a quote will be provided if performing work on a project basis.</p>	<p>10% off standard rate</p>

1 Services do not include travel beyond Portland, OR Metro area or legal counsel.
 2 Intermittent leave tracking based on employee self-reporting.