**TOWN OF STRATFORD**
**PURCHASING DEPARTMENT**
**STRATFORD, CONNECTICUT**

# REQUEST FOR PROPOSAL

RFP No. 2016-014

Issued: March 9, 2016

Subject: Payroll Processing Services

The Town of Stratford through the Office of the Purchasing Agent will receive SEALED PROPOSALS for furnishing the equipment described in the accompanying specifications, in accordance with the instructions, conditions and reservations that follow:

## A. CLOSING DATE:

Proposals will be received until 3:00 pm April 6, 2016, in the Office of the Purchasing Agent, Room 202, Town Hall, 2725 Main Street, Stratford, CT 06615.

Any proposal may be withdrawn prior to the above-scheduled time for receiving bids or authorized postponement thereof. Any proposals received after the date and time specified shall NOT be considered. No bidder may withdraw a proposal within 45 days after the actual opening thereof.

## B. INSTRUCTIONS:

Proposals are to be submitted (FOUR COPIES) in a sealed envelope/box and clearly marked with the bid number and description on the outside of the envelope, including all outer packaging (DHL, FedEx, UPS, etc).

Proposals must be delivered to:

Purchasing Department
Stratford Town Hall — Rm 202
2725 Main Street
Stratford, CT 06615

## C. CONDITIONS:

**Bid Surety:**

A Bid Surety is not required.

**Taxes:** The Town of Stratford is exempt from all State and Federal taxes. Do not include these amounts in your quotation.

**Addendums:** All addendums will be posted on the town website www.townofstratford.com. It is the responsibility of the bidder to check the website for any addendums before submitting their bid.

**Conflict of Interest:** No public official or employee shall, while serving as such, have any financial interest or engage in any business, employment, transaction or professional activity or incur any obligation of any nature which is in substantial conflict with the proper discharge of his/her duties or employment in the public interest.

## D. RESERVATIONS:

The Town of Stratford may consider informal any proposal not prepared and submitted to the Town in accordance with the provisions herein stated. The Town of Stratford reserves the right to reject any or all proposals or parts of proposals; to waive defects in same proposals; or to accept any proposal or part thereof deemed to be in the best interests of the Town of Stratford.

REQUEST FOR PROPOSALS
RFP 2016 - 014
Payroll Processing Services for
Town of Stratford

Contents

## SECTION I

## PROJECT OVERVIEW

The Town of Stratford is requesting proposals from qualified firms with significant experience to assist the town with its payroll processing and human resources processing. The Town Administration is the Project Representative and will oversee all aspects of the selection process.

The town expects to select and contract with one firm to provide payroll processing. Currently we are looking to see if vendors offer a solution to our needs. Additional services described in this Request for Proposal (RFP) may be engaged at a later date. The town may choose not to select any firm to provide the Payroll Processing. The town is an equal opportunity, affirmative action employer, does not discriminate because of race, religion, color, sex, national origin, sexual orientation, marital status, disability or any other factors protected by law. The firms responding to this RFP should be prepared to cooperate fully with the town, its staff and the Project Representative throughout the entire selection process.

The Town of Stratford relevant facts:

- Weekly payroll for approximately 450 full time employees, 70-200 part time employees
- Average number of employees paid per week; approximately 520
- Health, Dental, LTD, Life insurance, 401(a), 457 Defined Contribution, loans, Credit Union, Defined Benefit and Tax Deferred Annuity Plans, and voluntary employee insurances.
- Currently process payroll bi-weekly

## SECTION II

## SCOPE OF SERVICES

The selected firm shall work with and cooperate with the Project Representative or her designee in rendering services pursuant to this RFP.

Goals of outsourcing services:

- **Determine the best method** for establishing town data processing as we merge payroll processing/ human resources to the Town of Stratford hosted MUNIS system.
- **Maintain accuracy** and timeliness of all aspects of payroll processing including federal and state tax reporting and remittances.
- **Reduce risk** by having secure and solid payroll data, internal controls, automated regulatory filing and payment.
- **Flexibility** to implement new requirements, fringe benefits offerings and any other changes to town staff remuneration.
- **Scaleability**, enabling the town to select from a variety of ancillary services at a future date.
- Do you offer your products as Licensed, Hosted, SaaS or all three?
- If you offer a Hosted and/or a SaaS solution, what is the data center and network infrastructure?
- If you host the application, what types of technical resources are required?
- Provide a brief description of the security measures you provide in your hosting and/or SaaS environment.

- If data centers are physically secured, explain the method/technology used. For example are they Tier IV?
- How do you handle system upgrades? Are upgrades included in the basic agreement or are additional fees assessed?
- What type of customization can clients do without incurring additional fees?
- Who has responsibility for maintaining customization changes?
- Describe the integration between the payroll, time and attendance, and human resources modules.
- How much history can be maintained in your system and is the amount consistent across modules/applications? Does this require archiving records?

The services solicited in this RFP must address the stated goals for the outsourced services and include the following component areas of service. Each area of service must be quoted as separate components of the total bid price:

Processing of the town of Stratford's payroll checks and direct deposits on a biweekly basis (every two weeks).

Payroll tax reporting and administration.

New hire reporting.

Wage garnishment administration.

Payroll reporting including:

a. Payroll registers - biweekly.

b. Payroll tax reports - biweekly, quarterly & annually.

c. Pension deduction reports – biweekly, quarterly & annually

d. Miscellaneous payroll deduction reports - biweekly.

e. Cumulative payroll reporting for gross payroll, pay compensation components, payroll deductions and payroll taxes - biweekly.

f. Wage garnishment reporting and administration - biweekly.

g. Payroll Expense Distribution reporting - biweekly.

h. Year end processing including annual tax reporting including the processing of W-2 for employees.

Additional Services if offered:

1. Online data entry via internet.
2. Quarterly Pension Reporting.
3. Online services for employees i.e. payment statement review, W-2 review.
4. Online tax breakdown for manual checks.
5. Agency payment administration. (Garnishments, Child Support, Insurances)
6. Custom Reporting on payroll data.

**Human Resources**

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## *Organization Information*

Can you configure organizational structures by Division, Location, Functional Groups (i.e., Corporate = finance, accounting, legal, human resources making up one group), Departments?

Do you have the ability to run an organizational report and view it in an organizational chart format?

Does the system provide an employee summary view to display fields such as date of hire, job title, job code, reports to, salary, department, company code?

Does your system provide an employee filter or inquiry ability to sort employees?

Does your system have the ability for managers to update organization information online, such as reporting relationship or location, with approval?

Can your system support employees that hold multiple positions with different department and pay rates?

Is there the ability to maintain employee records differently by country and in compliance with local privacy regulations?

Please describe how your system complies with various privacy data regulations.

How are updates made to privacy regulations?

## *Recruitment*

Provide a recruiting solution overview.

Do you own your recruiting software solution or is it provided through a partnership arrangement?

How are candidates managed during the recruiting process?

What job boards are supported with your product? Describe how jobs are posted to Internet job boards.

Can the job posting be customized?

Can we easily create customized questions for individual requisitions in addition to the standard application?

Describe the ability for managers to directly view, comment and respond to applicants.

Describe the ability to search applicant database based on key words or criteria.

Can we track human resources or manager notes in the system?

Explain the ability for candidates to complete an employment profile.

Does it allow an applicant to be a candidate for multiple requisitions?

Does the system allow candidates to upload multiple documents or scanned images during application process, such as resume, cover letter or veteran’s preference form?

Does it allow an applicant to update a previously submitted application to apply for future openings?

Does your solution allow for an automatic email response to candidates? If so, please describe the communication types included in the solution. Are these configurable?

Describe the ability to forward information from recruitment into HRIS system so data does not need to be reentered.

## *New Hire*

Describe your employer configurable new hire workflow.

Explain the ability to create a new hire workflow that enables human resources to notify, assign tasks, or collect data from multiple parties in the event of a new hire.

Can we enter new hire data before start date or start of payroll period (effective dating)?

Does the system allow new hires to enter information via a web portal prior to start date?

## *Employee Termination*

Describe your employer configurable termination workflow and how it supports termination of employees and independent contractors (if this data can also be stored).

Can the system automatically cancel specified employee benefits upon termination?

Describe your system’s ability to create a termination workflow that enables human resources to notify, assign tasks, or collect data from multiple parties in the event of a termination. For example, to notify and record that computer access has been disabled.

Does the system provide turnover analysis reports? Explain the drill down capability.

Does your system have the ability to track termination by reason, date, rehire eligibility and COBRA election?

Can we archive terminated employee information indefinitely?

## *Benefits*

Does your system handle benefits administration?

Describe the integration between benefits and payroll.

Explain how your system facilitates reporting to third-party vendors.

Describe the system capabilities for online benefits enrollment.

Describe the life events that come standard along with those that require configuration.

How would the system assist in reconciling insurance bills or contributions due to third party administrators?

Can benefit plans be set up so only a specific group of employees are eligible for them?

Can benefit cost changes be future dated for a future year within the current year?

Does the system have the ability to handle calendar/fiscal benefit plans?

Are premiums automatically updated for age and salary benefit calculations?

Are insurance amounts automatically adjusted when a salary increases?

Can you automatically enroll a certain group of people in a benefit plan?

Do Employee Benefit Statements include the company's cost of benefits?

How does the system accommodate benefits requiring evidence of insurability?

Does the system notify administrator when new hire enrollment is complete or changes have been made?

In addition to enrollment and life events does employee self-service include the following:

- Viewing employee's current plans and covered dependents
- Viewing related information such as summary plan documents
- Viewing plan comparisons
- Links to carrier website
- Displays only the benefit plans for which the employee is eligible

How can employees manage dependent data in the system?

Does the system automatically remind employees to enroll if they have not completed the enrollment process by a specified date?

## *Affordable Care Act*

How has the system been upgraded to handle all of the benefit changes due to the Affordable Care Act?

Describe your ability to forecast costs.

Does your system allow for hours tracking hours per pay period for both Initial and Standard measurement periods?

Can your system simultaneously measure an employee in both a Standard and Initial measurement period?

How does your system capture declination or insurance covered dates?

Describe how your system takes into account the Standard Measurement Period, Admin Period and Stability period each and every year? Is it automated?

Describe how the system utilizes “Safe Harbor” rules.

What reports and/or worksheets are available for Affordable Care Act management?

How does your system capture the required data for the W-2 and 1094/1095 (B&C)? How does the overall process work (including print procedures)?

Do you provide all required forms for ACA and W-2?

## *Compensation Management*

Provide an overview of the key compensation features of your system.

Can you perform online compensation modeling?

How is the compensation features integrated with the HRIS and payroll functions?

Explain how the system allows managers to plan salary increases online, process approvals via workflow, and automatically implement increases on the effective date?

Please describe how managers approve proposed compensation increases and the ability to view budgets totals for their entire hierarchy?

Explain how your system creates and retains salary history?

What types of reports are available for compensation?

Does your system validate minimum and maximum salary (of grade) when pay is changed and provides a warning message as needed?

Explain how the same job can have different salary ranges based on job location (to account for geographical differences in pay).

Does it store compensation range information as part of the employee record?

Does your system allow employees to access current compensation and compensation range/plan information via self-service?

## *Performance Management*

Describe your performance management capabilities.

Does the system maintain information on performance reviews, including review history, overall review ratings, review schedules, and approvals?

Do you have the ability to have multiple review forms per type of employee and automatically link manager to the correct form?

Is there a configurable workflow to do online performance review completion and submission seeking the employee's input first and then the manager's flowing upward for additional approvals in the reporting line and then onto HR and payroll for processing?

Are both self and manager assessments available?

Describe the ability to complete 360 reviews.

Can cascading goals be set?

Can the manager and employee update goals and objectives?

Can you create, edit, update and delete company-wide competency models?

Ability to track performance reviews, both due date and date completed.

Can the system automatically notify a manager when a performance review is due and overdue?

## *Employee Self Service*

Describe your application's employee self-service functionality. What are the major features?

Is this application integrated with the main HRIS application?

Please explain how your employee self-service feature will assist in the communication between you and our employees. What types of information can be made available to our employees, reducing the amount of calls to HR and Payroll?

Does the system allow employees to change their own passwords?

Can employees' access company-level documentation?

How does your self service solution accommodate policy acknowledgement?

How do employees view and access benefits information?

How do you define activities or events in your self service solution?

What support would be required from our IT department?

How do you assist organizations in rolling out self-service? What training would be available to employees and/or managers?

To what degree can your self-service interface be customized?

## *Manager Self Service*

Provide an overview of the features available through manager self-service.

Describe how managers are limited to information for only their direct reports.

Describe the integration between your manager self-service application and your HRIS/Payroll software.

Describe to what level access to information can be controlled (i.e., screen, field, etc.).

Does the application provide managers access to the entire employee self-service functionality? Please explain.

Are managers able to run reports from self-service? How is it performed?

Ability to customize information, reports and workflows offered through self-service to different employee groups.

## *Document Management*

Describe your Document Management capabilities?

What formats are accepted/recognized?

Can the documents be linked to more than one workflow?

How can documents be searched?

Describe the security to restrict employees from seeing certain documents.

## *Payroll*

Summarize the payroll services you provide that would no longer need to be handled in-house.

Explain how the verification of payroll works.

Does your organization specifically handle deposit and filing of taxes and processing of W-2’s or is it handled by a 3rd party?

Does your organization file state unemployment insurance reports and quarterly tax returns (941)? Is this included in the base service or an additional fee?

Is this application integrated with your main HRIS product?

What methods for data entry exist in your solution?

How do you handle employees with multiple rates of pay who may cross multiple departments/cost center assignments?

Describe the check voiding process.

How do you handle imputed income?

Do you handle unlimited direct deposits? If no, what is the maximum?

Do you handle all aspects of HSA accounts (Employer contributions/Employee Direct deposit contributions)?  What is your process of handling the HSA?

Do you support payroll accumulators by: Federal reporting month-to-date, Quarter to date, Fiscal year to date, and Federal reporting year to date?

Do you associate end dates for deductions and automatically stop the deduction?

How does your system accommodate additional payroll processing for items like bonuses, expenses, commissions, etc.?

Explain what happens when an employee does not have enough net pay to cover his deductions for the pay period

Describe the vendor responsibilities for the yearend and year begin processes.

Describe the expectations for the client for yearend and year begin processes.

Describe the manual check process.

Administrators can immediately view the complete zero-to-net impact of changes made to time records.

Do you provide configurable, in-application audit reports for identifying potential issues? Please explain.

Supports an unlimited number of earning and deduction definitions.

How does your solution handle garnishment calculation, prioritization and pay?

Please describe to process to void and reissue checks.

How do you handle special taxation rules for non-cash benefits such as long term disability, group life insurance and community center memberships?

Does the solution have the ability to exclude pay types from eligible earnings for calculations?

## *Tax*

Do you provide full tax filing processes?

What tax updates, if any, are provided and how are these updates received?

Do you support one time additional tax amounts and/or overrides?

Do you provide all relevant end of year payroll processing reports including W-2, 941, 1099s State, SUI?

How do you handle inquiries, discrepancies, and resolution for federal, state, and local tax inquiries?

Describe tax resources provided to your customers on tax regulations at the federal, state, and local levels? How do your customers access this information?

How do you distinguish yourself from the competition in the area of tax processing?

## *General Ledger Interface*

Describe your general ledger interface process.

Please describe how the proposed system will support multi-tier labor allocations to post actual employee cost to GL. This includes the allocation of wages, employee and employer taxes, and employee and employer deductions by multiple organizational levels.

What reporting tools are available to query General Ledger transactions generated from payroll?

Can data be exported to excel for editing capabilities?

Can we use descriptions in the General Ledger? Is there a limitation to length, character segments of General Ledger number?

Do we have the ability to create new G/L codes and mappings internally?

GL setup tables are accessible by users to change at any time

Does it accommodate exceptions to the GL mapping down to the employee level?

Please describe the GL entries for the accrual of payroll at month-end.

Will adjustments be automatically posted to GL? Explain.

## *Time and Attendance*

Describe your time and attendance capabilities.

How do you minimize downtime for 24/7 operations?

How does the system enforce access control?

Is data viewed and available in real time?

Who can define access control rules?

Describe the approval process within your application?

Can the employee and approver check status of the time records (processed or not processed) for a specific time period?

Can the employee and approver review information from the time records in detail and in summary form (as part of the core package)?

Are employees able to access prior period information?

Describe automatic email notifications, alerts, reminders, and exception reporting.

Is an audit trail of any edits kept?

How does synchronization of data work across multiple sites/locations?

What are the standard methods used to capture employee hours?

Does the application have the ability to track hours worked by day?

Do you have the a time clock system (Bio-metric/card swipe)?

Describe how your application can support Labor Distribution.

Can we set default job codes, business unit codes or project codes in system?

What are your procedures for archiving or retaining historical information?

Can the system distinguish between an employee and a temporary employee?

Does the application allow for multiple methods for calculation of overtime and double-time (i.e. premium time) based on employee type?

How does your system handle predefined Holidays?

Does the application have the capability to automatically remind employees and managers to sign and/or approve time-off/timecards requests?

**Schedules**

Provide an overview of the system's scheduling functions (e.g., building schedules, templates, scheduling vacations, and default holidays).

Can an employee's time card be prepopulated from their schedule?

Explain the ability to pre-populate time with approved time off, leaves and holidays.

Can supervisors view schedules within their workgroup and by employee?

Can our supervisors make changes either to the schedule or reported time?

**Approvals**

Describe the time card approval process within your application.

Can an employee make edits to their time sheet prior to submission for approval?

Does it allow for multiple individuals to approve time electronically?

**Overtime and Pay Rules**

Describe how your system supports wages & various overtime rules

Can our employees choose compensatory time in lieu of OT and allow the employee to use compensatory time in lieu of leave?

Explain the ability to flag hours scheduled or entered in excess of 40 when an employee is working multiple positions.

Does the system have the ability to flag supervisors when employees are approaching OT?

Does your system have the ability to calculate weighted average OT?

Can the system handle OT when it is both paid for hours in excess of scheduled hours for the day <u>or</u> hours over 40 in a week?

## *Time Off/Leaves of Absence*

Please explain your time off tracking capabilities

Explain how your solution handles time off/vacation request (e.g., request form, validation of PTO balance, and rules to prevent overdraw).

How does your system track scheduled leave versus leave actually taken? Is this information available for review?

Does the application automatically start tracking accrual hours for new hires and employees with status changes based on rules previously created?

Do we have the ability to assign accrual criteria (or tables) to individual or groups of employees?

Will our employees and managers be able to directly view PTO amounts earned and taken, and the dates on which the accruals were used? Please explain.

Does approved time off automatically pre-populated in time and attendance?

Can your system accommodate FMLA tracking?

Will we have the ability to do multiple coding for leave hours? For example, time off could be coded both as PTO and FMLA?

Does the solution have the ability to create an employee time off/leave calendar by group, division or department. Is this available through self-service?

Please describe available leave reports.

## *Reporting*

Please describe your reporting functionality.

Describe how your report writer can filter data in multiple ways using any field? Can data be sorted by both financial parameters (business unit, budget code) and human resources parameters (organization level, job code)?

List or attach standard reports provided through your system.

Describe the system's ability to format reports. Does the data have to be exported to a Microsoft Office product before formatting can occur? Attach a formatted report that was created using your system that includes an organization logo.

Explain your ability to import and export data from Microsoft Word, Excel and Access.

Does your system have point-in-time reporting capabilities?

Explain the system's ability to run report with historical data.

Does your system provide required governmental reports such as EEO, Veteran status, Affordable Care Act, etc.?

Does the system have the ability to handle consolidated reporting across companies/organizations?

## *Business Analytics*

Describe your capability to support data analytics dashboards.

Does your software support customizable dashboards?

Is Data Analytics/Dashboards/Business Intelligence integrated or is it sold in a separate module?

Is access to analytic dashboards controlled by role based security?

Is all reporting and analytics data is real-time across all functional areas?

Reporting and analytics data visibility respects the configured security model.

## *Interfaces*

If we want to interface to a third-party system which you do not have a standard interface for, describe the architecture/tools/process we would need to follow to complete the interface.

Please provide us with a list of the supported APIs.

Do you support custom interfaces?

## *Application Security*

Describe the proposed system's Application level security.

Does your application use a secure connection if hosted? If so, please explain the security model used.

Does the proposed application support single sign on?

Is your security roles based or user based?

How are the users and security roles administered?

What is the application authentication process? What methods are used to authorize users?

Can users have more than one security profile?

Does your application allow for customer defined ID and password methodologies?

Does your application allow for global security policies (e.g., number of invalid attempts before reset, time outs)?

How is validation for forgotten passwords processed when an employee locks out or has forgotten log-on information?

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**Payroll**

## Area of Service: Employee Records and Interface

- The system must create a "permanent" record for each employee that will include information that does not change from pay period to pay period. Each employee will be assigned an employee number that will remain unchanged while employed by the town.
- At a minimum the permanent file will include items such as name, social security number, address, telephone #'s, e-mail address (optional), DOB, DOH, emergency contact information, gender and marital status. Payroll elections (deductions) W-4's, pension, medical, dental, supplemental insurances, garnishments (if applicable) etc.
- Employee categories – Permanent or temporary (on call), full time, part-time, union or non union, grade/step (if applicable), employee status (active, terminated, retired, other).
- Job classifications (as it will apply to calculating vacation, sick benefits and personal days).
- Provide online access, upload ability and/or other methodology for a <u>single</u> employee record set-up and maintenance. Record changes could include but are not limited to pay rate changes, position changes, address changes, benefit eligibility/election changes and terminations.
- Ability to assign pay and benefit elections to employees by category

wherever possible to facilitate global updating, including but not limited to multiple town specific staffing groups (departments, supervisors, FTE %s, insurance plans, etc.), salary steps, ranges and special pay options.

- Provide online access employee inquiry providing relational database access to employee accruals, earning history, check history, W-2 data etc. Provide duplicate copies or access for online self-service to employees to produce copies of past pay check stubs and prior year W-2's.
- Employee records should retain/maintain history of employee over time. Address method and list additional cost, if any to download/add history to system.
- Provide security levels that will facilitate internal controls such as but not limited to discrete staff user rights to update employee records, upload hours, approve payroll disbursement, and/or sole HR access to non-payroll records.

**Area of Service: Process Payroll**

- Process weekly or bi-weekly payrolls for entire employee's based on timeframe agreed upon by the town and payroll service.
- The payroll service must provide the Town the ability to enter payroll hours online, make edits/corrections, and deliver checks, direct deposit advice etc. within 2 days or less from time of entry. Future – allow automatic update of

hours when new technology is introduced for timekeeping allowing online review and approval of timesheets.

- Allow the  following check types; direct deposit advise, regular (paper) checks, voids, manual, provide the capability for vendor checks (as it relates to payroll) and/or any combination of both payment methods.
- New banking instructions from employees shall be pre-noted with employee's banking institution prior to initiating new banking instructions to test validity of employee's banking information.
- Supports retro pay and calculation.
- Accommodates FSLA in overtime calculations.
- Accomodates longevity and lump sum calculations.
- Ability to distribute payroll, track time by multiple codes such as, but not limited to, specific general ledger accounts, projects and workers compensation codes. (I.e. regular vs grants).
- Process retro check payment amounts, final checks or special pay runs that does not occur in conjunction with the standard payroll schedule. Process to occur in a timely manner and to be paid by paper check regardless of employee's regular preference of payment method.
- Provide ability to include and track taxable and non taxable benefits.

**Area of Service: Tax Deposits, Quarterly & Annual Payroll Tax Reports, W-2 filing, and W-2 and 1099 submissions.**

- All federal and state tax deposits to be made in a timely manner consistent with applicable federal and state law and reporting requirements.
- Completion and filing of federal and state quarterly payroll tax reports in a timely manner consistent with federal and state law and reporting requirements.
- Completion and filing of W-2 forms, including distribution to employees.
- Electronic submissions of W-2 files to federal, state and agencies required by law.

**Area of Service: Reporting and Data Download.**

- Ability to generate a report which reflects both employee and employer retirement contributions, to correspond with payroll. This report must also include month-to-date and year-to-dated totals by fiscal and calendar year.
- Ability to print/view single employee records which include the option of Fiscal year-to-dated or calendar year-to-dated totals.

- Reporting capabilities which may include,  but are not limited to DOB/age list, anniversary lists, seniority lists with the ability to differentiate between union and NBU employees, pay/hour reports by employee, department, job history reports, organizational reports related to all hires.
- Provide general ledger journal entry to record payroll batches into accounting software (either manual by FTP import).

- Ability to generate reports by deduction category as needed
- Ability to generate a variety of budget status reports.
- Provide flexibility for user to define selection criteria, data ranges, sorting and grouping options, and report output, so as to allow custom reporting.
- Ability to generate report for the purposes of budgeting and running alternate cost scenarios for salary and benefits by department or employee.
- Ability to generate reports for the purposes of grant and/or project reporting for staff costs as well as annual staff statements of total salary and benefits.

- EEO status, including automated reports for EEO-4 reporting.
- Ability to generate report for FMLA and workers' compensation as needed.

**Area of Service: Time and Attendance**.

- Proposal for alternate time reporting technology that meets town needs will be considered and should be described and priced clearly.
- Proposed alternate time reporting technology must provide Supervisor report or online window to approve employees' time entry.
- Proposed alternate time reporting technology must provide method to suspend the processing of time sheet entries that do not have two levels of review prior to processing entire payroll batch, along with a warning method to notify Administrative Specialist that suspended records exist prior to payroll.
- Management of leave requests and approvals, and exception reporting.
- Track and process accrual changes based on years of service, process

conversions, and accrual lost over max according to town policy.

- Track payouts based on town policy.
- Track probationary periods.
- Track longevity eligibility based upon years of service and anniversary date.
- Track vacations based upon full time status (30hours or more), employee classification and years of service on an anniversary date basis.
- Track sick days and personal days on calendar year basis.
  - Track sick days for part-time employees who work 1,000 hours or more based on a calendar year.
  - Track sick days for part-time employees who are employed 2 years or more and work between 500 -999 hours annually based upon calendar year.
- Ability to track time by multiple codes such as, but not limited to, specific projects and workers compensation codes.

## *Implementation*

Describe your approach to implementation.

Provide a sample project plan

Describe the typical implementation team and their roles and experience.

What is the training process for the first payroll run?

How many parallel runs do you perform?

Does the system allow for the importing of initial data?

## *Service & Support*

What is your customer service model?

How many clients and individuals do you serve?

Do you use your Web site as a mechanism to provide support to your clients?

What written documentation is provided with your service? What type of information is available on your website?

How is the quality of your support center monitored? Describe any formal quality programs you have in place. Review any available quality or performance data.

What percentage of service calls is resolved upon first contact? If a call is not resolved, what is the process to resolve the issue?

Do you facilitate a user group? How does the user group function?

Do you provide a bridge program to interface with MUNIS?

## *Training*

What types of training do you offer customers?

What training materials do you provide?

What training options are available above and beyond basic training?

What type of technical training do you provide to ensure that your clients remain abreast of regulatory changes with regard to payroll? .

**Area of Service: Training and Support**.

- Data Security: provide information about your security standards given the sensitive nature of payroll data including tech specifications of any hosted data servers and software, web-based communications, electronic payments, data encryption, data storage, backup systems for data and continuity of service for payroll processing, etc

- Technical specifications: describe minimum and optimal technical specifications required for town devices, hardware, software and connectivity to implement proposed services.
- Research payroll and HR issues on request.
- Provide training and act as a resource to the town Administrative Staff when needed.
- Provide training resources to town departments, general and specific, to educate employees and supervisors on use of interfaces where applicable.
- Training resources should include but are not limited to the use of any remote time entry devises, how to upload documents, and how to create self-generated reports.
- Other services as may be agreed to by the parties, or as proposed pursuant to this RFQ

## SECTION III

## GENERAL INSTRUCTIONS

### <u>Administrative Information</u>

1. This RFP is issued under the authority of:

   The Town of Stratford

   Purchasing Department

   2725 Main Street

   Stratford, CT  06615

All inquiries concerning the intent of this request, contract information or site access shall be directed in writing to purchasing@townofstratford.com. All questions must be submitted by March 24. Responses will be in the form of an Addendum posted on the Town website.

2. If there are any deviations from the RFP requirements, please indicate the reason for such deviation in writing.
3. A list of all solicited proposers will be provided to any proposer upon receipt of a written request.

**Proposal Review**

All proposals received in compliance with the instructions of this RFP will be reviewed by the Project Representative and selected proposal evaluators.

## SECTION IV

## PROPOSAL RESPONSE

**Cover Sheet (Mandatory)**

The submission shall list the name and signature of the proposing firm's authorized representative as well as his/her address and telephone number must be provided. The proposal must be dated on this page. The authorized representative is to signify the proposer's agreement and compliance with all requirements set forth in the RFQ. In addition, the signature will certify the proposer's acceptance of and responsibility for the following (note that the following language must be reproduced above proposer's signature):

1. All data presented in the proposal is accurate and complete.
2. Acknowledgment that the proposer has read and understood the RFP and the proposal is made in accordance with the contents of the RFP unless otherwise noted in the proposal.
3. The discovery of any significant inaccuracy in information submitted by the proposer shall constitute good and sufficient cause for rejection of the proposal.
4. Certify that your firm will purchase and maintain Insurance for the duration of the contract and define levels of coverage.

**Statement of Qualifications and Experience.**

The Company qualification information shall include:

Professional resume(s) stating qualifications to provide the services described herein. Include number of years in business, number of employees/professional associates, location of office or offices, names of principals or employees who will provide the services, and type of entity (corporation, partnership, etc.) and state in which it is formed. Describe the experience providing payroll processing and ancillary services for public, non-profit and private sector clients.

**Clients/References.**

Provide references of customers, clients or owners for whom you have delivered comparable payroll services including Public Libraries and other businesses. Please provide addresses, phone numbers and individual contacts for each reference.

**Statement of Capabilities**

The company shall be able to demonstrate the ability to perform the scope of work required. Provide information on your data security as well as software and hardware requirements for the Town. Describe format and availability options (web based, self service, file format, etc.) for reports and data sets.

**Fees**

Provide the full fees and cost of services on the attached Proposal Submission Form. The cost of submittals and any other expenses related to this RFP including travel for interviews or inspections shall be entirely the responsibility of the proposer. Provide estimate of any one-time conversion or start up costs associated with implementing the proposed services. The submission will become a part of any contract issued for this project.

**Statement of Good Standing (Mandatory)**

Provide a statement of assurance that your firm is not currently in violation of any regulatory agency rules, or, if in violation, the violation does not have a material adverse effect on your ability to perform under the proposed contract.

The Company shall disclose any material litigation.

**SECTION VI**

**EVALUATION AND SELECTION**

| Factor | Maximum Points |
|---|---|
| Qualifications and Experience | 40 |
| Capabilities | 40 |
| Fee | 20 |
| Maximum Points | 100 |

Proposals will be evaluated based on the quality of responses to specific items outlined in the PROPOSAL RESPONSE section of this RFP. Each valid proposal will be reviewed by the Project Representative. Additional clarifying material may be requested by the Town. The Project Representative will develop a shortlist of firms. Interviews may be conducted with the final companies presenting proposals. Interviews will be rated based on information presented during interviews, and overall quality of the service proposed. Proposals which are incomplete or non-responsive to this RFP may be rejected. The town does not accept responsibility for the return of successful or unsuccessful proposals.