REQUEST FOR PROPOSAL

Save the Family Foundation of Arizona (STF) &
ARM of Save the Family Foundation (ARM)

The RFP Coordinator is the sole point of contact for this solicitation. All communication between the Consultant and Save the Family regarding this RFP shall be with the RFP Coordinator:

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RFP INTRODUCTION

Company Background

About Save the Family (STF):

Established in 1988 by Mesa business leaders, Save the Family is the East Valley’s leading provider of housing, case management and supportive services for nearly 700 homeless and impoverished families and children each year. STF mission is **equipping families to address poverty, overcome homelessness, and achieve self-sufficiency.**

Save the Family provides a holistic approach to serving homeless and impoverished families with children. Families are matched with the program best suited to their individual needs and abilities. Once housed, Case Managers help parents set and achieve goals geared toward ensuring the family’s long-term housing and financial stability, which often can include securing employment, moving up in the workplace, improving financial literacy, building life-skills, and addressing substance abuse and mental health. The case manager helps the family through their entire journey to self-sufficiency.

About ARM of Save the Family Foundation (ARM):

The mission of the A.R.M. Program is to **aid families in maintaining self-sufficiency by bridging the gap between subsidized rent to fair market rent or homeownership, through decent and safe housing that is well below market rate rents.**

In 1992, Save the Family created its affiliate, the Affordable Rental Movement, to develop and operate affordable rental units to help fill the large gap in affordable rentals for formerly homeless and low-income families – “the working poor”. Supportive Services are offered to participants by STF. It also serves as co-developer in 3 LIHTC developments: Escobedo I, Escobedo II, and Valor. ARM applied as the co-developer of a new LIHTC project, notice of awards to be released in June 2023. ARM is registered as a Community Housing Development Organization (CHDO).

Both entities have June 30 year ends.

STF and ARM programming includes:

- **STF Step Up to Independence™.** A new transitional housing model that targets homeless families living doubled up with other families, in motels, or in other temporary situations currently unserved by funding provided by the federal government. This program is fully funded through private contributions.

- **STF Families, Adults, and Children’s Empowerment Services (FACES) provides supportive services that include** a dedicated career development center, financial counseling, and children’s services. We also offer in-house mental health and substance abuse support for families in our programs.
• STF Rapid Rehousing (RRH) and Tenant Based Rental Assistance (TBRA) Housing Placement Services are federal programs funded through various government entities. STF provides short-term rental assistance and case management services with access to supportive services to program participants.

• ARM Affordable Housing services includes approximately 150 scattered housing units for low-income families throughout the east valley and 182 LIHTC housing units. Units acquired using government funding generally have 15–30-year affordability restrictions.

Operations:
STF and ARM are exempt from federal and state income taxes as organizations other than private foundations under 501(c)(3) of the Internal Revenue Code and similar state provision.

The Agency headquarters are at 125 E University Dr. in Mesa Arizona. STF also has staff working at 444 N Country Club, Mesa (Maintenance), 1001 E 8th St., Tempe (LIHTC-Valor), and 450 N. Hibbert Bldg. 6, Mesa (LIHTC-Escobedo).

STF receives funding from governments, private sources, and participant fees. ARM receives funding from governments for housing unit acquisitions (mostly HOME funding) and rents from tenants.

STF has approximately 45 employees and ARM has 3 employees. The Agency has F/T, P/T, salary, and hourly employees. Employees are paid bi-weekly. Benefits are deducted 2x per month. There are cross entity activities. For example, a supervisor in one entity may oversee the staff in the other entity, therefore supervisor must be able to access other entity to approve staff time.

The Agency has two fully remote workers. The Agency offers a choice of 3 medical plans, 1 dental, 1 vision, LTD, STD, critical care, and life insurance. Certain employees may receive a phone allowance. The Agency issues equipment such as cellphones, laptops, and hotspots.

The Agency offers a 401k plan held with John Hancock. FMLA leave is also currently offered although the Agency is under 50 employees.

Employees track time by program and grant and many work in several programs and/or grants daily. The system must allow for time coding to include – department, program, location, and grant. Based on employee position available departments, programs, locations, and grants should be limited. Electronic timesheet/reports must include time worked coded to the level above and show the employee/user ID for time entered and/or submitted and the supervisor/user ID for the approval of time.

Employees may earn overtime, premium time, and an on-call flat rate. Employees may also work fill-in time at a different rate (potentially for a different supervisor).

Employees receive 11 full day paid holidays and two ½ day paid holidays. Staff are eligible for 1 Floater Holiday per fiscal year. Employees may have access to paid time off for jury duty and bereavement leave within predetermined limits.

PTO is available to all regular full-time employees that have worked at least 90 days of continuous employment with the Agency. The amount of PTO employees receive increases with the length of their active
employment. Sick time accrues based on Arizona State law and is not eligible for payout upon separation. PTO and Sick have annual carryover limits.

Resigning employees who have completed 3 months or more of continuous regular status employment will be paid for accrued, but unused, PTO earned through the last fully worked pay period, provided adequate notice of resignation is provided. The percentage of PTO paid upon separation increases with the length of employment.

Employees may receive business expense reimbursements and/or mileage reimbursements.

Performance reviews occur after a 6 month probationary period and at the end of each fiscal year. Reviews include measurable goals with due dates.

The Agency collects vehicle insurance cards, 36 month driving records, CPR certifications, and fingerprint clearance cards all of which have varying expiration/renewal dates. The Agency conducts background checks and drug tests for new employees.

Confidentiality Statement

The information contained in this document is proprietary to Save the Family Foundation (STF) and ARM. It is distributed to you for the sole purpose of providing information for your response to STF/ARM’s Request for Proposal. As such, this document or any part thereof may not be reproduced or redistributed without written consent from STF/ARM.

Invitation to Bid

STF/ARM is searching for a Payroll Software vendor offering a payroll, tax, and benefit solution with HCM options that could provide a single HRMS platform for the organization. We are searching for a vendor that understands our industry and has a commitment to continuous improvement through innovation, creativity, advanced technology, and strategic partnership with STF/ARM. In summary, STF/ARM is searching for a trusted, leading provider that will support and contribute to STF/ARM’s effort to become best in class, attain its operational objectives, financial targets, and enviable level of employee satisfaction.

The objectives of this RFP are as follows:

To offer your company the opportunity to become a viable and strategic vendor to STF/ARM.

To give each Vendor the descriptive background of current requirements for STF/ARM’s HRMS Solution Requirements.

You are being asked to provide a proposal for the requirements described in this RFP.

PROPOSAL INSTRUCTIONS

General Considerations

During the RFP response preparation period ending at 5:00 p.m. on Wednesday August 2, 2023, no verbal/telephone requests for information will be accepted. You are encouraged to submit, via e-mail or by regular mail, questions, inquiries, and requests for clarifications to the contact named on the cover page.
STF/ARM RFP evaluation team composed of representatives from HR, Finance, and Program. We will review all vendor proposals and collectively select the vendor(s) of choice.

Acceptance of Vendor Proposal

STF/ARM reserves the right to accept or reject any or all RFP bids, to take exception to the RFP specifications, or to waive any formalities. STF/ARM, at its sole discretion, may decide to take no procurement action as a result of the RFP and/or may re-bid all or portions of the RFP. STF/ARM reserves the right to award the RFP to other than the lowest priced vendor proposal based upon the Evaluation and Selection Criteria.

In the event of questions/answers, modifications, clarifications, or additions to the RFP become necessary as determined by STF/ARM, all vendors who have indicated their intent to apply will receive, in writing, the revised addenda to the RFP. Once again please be reminded that all Vendor inquiries must be made in writing.

Proposal Preparation Costs

All costs incurred by the vendor(s) in the preparation and presentation of the proposal response including costs for studies or designs, will be absorbed entirely by the vendor(s).

Proposal Costs Submission

The Contract awarded will be at a firm and fixed price for the duration of the contract as agreed by both parties. The Vendor is responsible for clearly identifying and submitting, in their response, all costs required of STF/ARM.

Proposal Submission

Vendor’s proposal in response to this RFP will be incorporated into the final agreement between STF/ARM and the selected Vendor(s). The submitted proposals require the following sections in this order:

- Executive Summary
- Company Background Information
- Vendor Questionnaire
- Proposal Quote
- Project Management Approach
- References
- Project Team Staffing

Proposal Submission Due Date

Proposals should be emailed to the RFP Coordinator with vendor contact person and information on the cover page no later than Friday August 11, 2023. Proposals should be sent electronically.

RFP Schedule

- RFP Distributed: Friday, July 21, 2023
- Intent to Bid Due Date: Friday, July 28, 2023
- Deadline for Clarification Questions: Wednesday, August 2, 2023
- Vendor Proposal Due Date: Friday, August 11, 2023.
- Vendor Presentations: varied, August 22-24
- Vendors Notification of Decision: Tuesday, August 29, 2023
- Contracts Signed: Monday, August 31, 2023
- Project Implementation Launched: Monday, October 2, 2023
- Target Go Live Date: Monday, January 1, 2024
NOTE: Vendor should reserve time during presentation window, finalist’s contact noted in RFP response will be notified of maximum 2-4 hour demonstration time slot, along with any request to demonstrate specific functionality described within the response. Presentations will be in hybrid with in-person at the headquarters in Mesa. The Agency reserves the right, at its discretion, to adjust this schedule of events as it deems necessary.

Evaluation and Selection Criteria

Each Proposal received must adhere to the instructions, format/content, and specifications. This will ensure that evaluation criteria can be systematically applied to all Vendors. The major criteria categories for selection and evaluation are listed below:

Satisfactory completion of all required responses,
Extent to which the solution addresses requirements of RFP,
Vendor’s compliance expertise and experience,
Level of solution integration with modules,
Quality of service and support,
Configurability for unique organizational characteristics (compliance, labor costing, etc.),
Proposed project plan for transition, implementation, and integration of proposed solution,
Previous related experience and/or referrals, and
Price

Agency Procurement Actions: Procurement actions shall be conducted only with responsible contractors who have technical and financial competence to perform, who have the financial responsibility in business dealings and who have a satisfactory record if integrity. Before awarding a contract, STF shall review the proposed contractor’s ability to perform the contract successfully, considering factors such as the contractor’s integrity, compliance with public policy, record of past performance and financial and technical resources. STF shall not award a new contract or conduct new business with a bidding contractor, vendor or applicant who (i) has past due financial obligations or indebtedness to STF pursuant to a contract or other transaction and has not fulfilled the obligation prior to submission of a bid proposal or application for a contract, (ii) has an existing claim, demand, litigation action, investigation, hearing, or other legal, administrative, arbitral or similar preceding or dispute against STF whether civil or criminal (including any appeal or review of any of the foregoing) or (iii) in STF’s reasonable discretion, has taken action that may give rise to or threatened to assert a claim, demand, litigation action, investigation, hearing, or other legal, administrative, arbitral or similar proceeding or dispute against STF. The Chief Executive Officer (CEO) or Chief Financial Officer (CFO) may waive the requirements of this paragraph for good cause as determined by the CEO and CFO and if it is otherwise in STF’s best interests.

Final Selection and Award

STF/ARM will notify each participating vendor of the selection/approval or rejection of their proposal. This decision will be the final decision for awarding services under the RFP. STF/ARM reserves the right to reject any, portions of, or all proposals without giving reason for the reject, and to award a contract or contracts to the bidder of their choice.

No selection/approval will be deemed final until the vendor(s) executes a contract with STF/ARM. The selection and contract negotiations will not be separate processes.
VENDOR QUESTIONNAIRE

Company Overview

1. Identify your company name and headquarters, along with the name and headquarters of your parent corporation, if applicable. Provide address, main phone number, and website URL.

2. Provide a brief overview of your company and history of your organization.

3. What is the core product of your business?

4. What separates your product from your competition?

5. What are your major industry market areas? Describe the types of Non-Profit Industry customers you service.

6. What is the projected growth and development of your company?

7. Please identify the solution(s) you are proposing.

8. How do you sell your proposed solution (e.g. ASP, Vendor-hosted, customer-hosted, etc.)?

9. Is the proposed solution cloud-based?

10. What is the total number of active clients that use the proposed solution?

11. What is the average size of your customers?

HCM Product Functionality

Core HRIS

1. Is your solution a unified one for HCM and Payroll (Is the system a single database or a series of integrated modules?) Include number of separate databases if applicable.

2. Does your solution have an intuitive, user-friendly interface? Please explain.

3. Does the solution have the ability to support employee self-service functionality so that employees can view and manage their own personal data, provide access to compensation and benefits data and provide updated balance and accrual details for time off policies? Please explain.

4. Describe how the software facilitates the maintenance of employee data and creation of employee history.

5. Is manager self-service functionality provided so that managers can easily view important metrics, address workflow items, view applicants, approve time sheets, and more?
6. Does the system alert managers to items that require their attention or approval? Job changes, credential compliance, late timesheets?

7. Does the system support employee acknowledgments that can be electronically acknowledged, downloaded, and/or stored in an electronic employee file?

8. Does the system maintain an auditable electronic employee file? If so, how long is the information stored in the database? Is there a data storage limit?

9. Does the solution support the tracking and management of company property issued to employees? Please explain.

10. Does the solution provide a compensation structure that can be defined by us and is configurable?

11. The system must provide standard capabilities to model and report on organization, location, general ledger, and reports-to structure. Is integration with map functionality provided?

12. Does the system allow for temporary delegation of manager responsibilities for vacation coverage (e.g.)?

13. Does the system provide support for multiple kinds of workers: full time, part time, fill-in, interns and contractors?

14. Does the system allow for effective date tracking for key position and employee data?

15. Describe the workflow capabilities within your system including the automation and the degree of configurability available.

16. Is there any limit to the number of approvals that a workflow can go through?

17. Does your workflow capability support the ability to define approvers by role or reports-to relationships?

18. Does your workflow capability send emails to approvers to inform them that they have a task requiring their attention?

19. Can users cancel pending workflows?

20. Does your workflow capture audit details about the change being processed and who approved the change?

21. Is there a reporting interface with the ability to view, export and print reports in differing formats (e.g. PDF, Excel)?

22. Can the system track disciplinary actions and outcomes?

23. Does the system manage and track workplace incidents?

24. Can the system track performance management cycles dates (60 day, 180 day, annual, etc.)
25. Can the solution be configured easily by us or would it require vendor support?

26. Does your solution require multiple logins for different modules?

27. Does the system support and create an organizational chart within the platform? If so, is the organizational chart actionable? Does it integrate with manager self-service?

28. How are positions maintained in the system?

29. What information associated with the employee is controlled by the position?

30. What are the system rules for calculating FTEs?

31. How does the system handle acquisitions and mergers? Specifically, what is required to add a new company to the system?

32. Is the system accessible via mobile? If so, what devices? Describe the extent of the functions provided on the mobile version.

**Time & Attendance**

1. Is the Time & Attendance system part of a unified HCM and Payroll system or a separate database? Please explain the integration method.

2. Please describe the solution’s capabilities to manage time off administration, self-service for time off requests and approvals.

3. Does the system support web time entry (no proprietary clocks)? If so, how is employee location verified when clocking in or out?

4. Does the system allow for the transfer between job codes or departments?

5. Does the system provide online employee and manager attestation?

6. Does the system provide dashboard views of time entry to address missed punches and/or missing time?

7. Can the system produce real-time labor analytics? Please explain.

8. Can the system support matrix approvals for employees working in multiple departments?

9. Can you configure reasons for taking time off? (e.g. vacation, sick, jury duty, etc.)

10. Does the system automatically calculate employee balances?

11. Can you correct time off balances for a given employee?

12. Can employees view approved time off, time taken, and time off balances remaining?
13. Will the system provide alerts based on PTO balances? (negative, approaching zero, have not taken PTO this year, etc.)

14. Will the system provide alerts to managers for missing punches, no punches, off schedule, etc.?

15. Does the system provide full employee attendance history?

16. Can the system support multiple pay groups?

17. Describe how the system supports the allocation of labor between departments for distribution of wages.

18. Describe how the system provides and manages role-based security throughout the platform.

19. Does the system maintain an audit trail/reports for all punch data changes?

20. Does the system allow for comments to be attached to the employee record?

21. Can the system require comments or reason codes for punch data changes?

22. How long is time data stored in the system? Is it purged after a certain date range?

**Benefits Administration**

1. Is the Benefits Administration function part of a unified HCM and Payroll solution or a separate database? Please explain the integration method.

2. Does the system allow for benefits analysis reporting? (By benefits group, benefit type, benefit plan, coverage type with employee and employer paid amounts, etc.)

3. Please describe the functionality provided for open enrollment (i.e. is it web based? Can employees utilize self-service to enroll, is the enrollment interface easy to use, etc.)?

4. Does the system provide email messaging to employees?

5. Describe your system’s ability to track and administer qualifying life events and available changes automatically.

6. Does the solution provide carrier integration to benefits providers, providing an automated process for sharing enrollment details from the system?

7. Does the system maintain active carrier connectivity?

8. Can the system support bill reconciliation and audit reporting?
9. Does your solution provide features for benefits administration? The ability for benefits administrators to easily track, launch and manage enrollments across the organization; configure eligibility requirements and set up benefits plans and options must be available.

10. Describe the types of benefit plans your system supports.

11. Describe the types of eligibility criteria that can be configured for benefit plans in your system.

12. Does your system charge extra for benefits administration or carrier integration?

13. Does your system send automatic benefit deductions calculations information each payroll run without manual intervention?

14. Does the system support accrual management for missed deductions?

15. Does your system track and maintain employee data on dependents and beneficiaries?

16. Does your system send automatic benefit deductions calculations information each payroll run without manual intervention?

17. Does the system support accrual management for missed deductions?

18. Does your system track and maintain employee data on dependents and beneficiaries?

19. Describe how your system provides employee benefit summary statements.

20. Does your system display employer costs per plan as well as employee costs? Is this configurable?

21. Does the system support EOI tracking and notification?

22. Can the system provide support for fully insured and self-insured programs?

**Reporting/ Workforce Analytics**

1. Describe the proposed system’s Workforce Analytics capabilities in detail.

2. Are there standard reports within the solution? If so, please list.

3. Does the system provide an ad-hoc report writer? If so, does it include all fields in the data dictionary?

4. Is the report writer designed for ease-of-use? Describe how a non-technical user can create reports without IT assistance.

5. Do reports and dashboards feature drill-down capabilities?

6. Can the system support multiple options for output? (.xls, .csv, .pdf, etc.)
7. Does the system provide point-in-time reporting? Please explain.

8. Is all historical data in the system reportable? Please explain.

9. Are government reports available? (OSHA, Vets, EEO, New Hire, etc.)

10. Does the system support cross-domain reporting? (Payroll data with Benefits data, e.g.)

11. Does the system support a combination of historical and current data in the same report? (i.e. transfer “From” and “To”).

12. Do you offer data aggregation across multiple systems (GL, EHR/EMR, HR, Payroll, etc.) for use in a data warehouse?

**Recruiting Management**

1. Describe the proposed solution’s Recruiting Management capabilities in detail.

2. Does the system allow for a hiring manager or recruiter to create a new requisition using a requisition wizard?

3. Does the system provide vacancy reporting for administrators and managers with the ability to calculate daily lost revenue for open positions?

4. Can the system allow us to select desired sourcing channels such as internal job postings, specific job boards, external search firms, etc.?

5. Does the system provide job board syndication?

6. Can the system electronically route requests for requisitions to the correct approver?

7. Does the system allow for the creation of multiple jobs openings from a single requisition?

8. Does the system allow users to preview job postings prior to posting on a company website and/or external job boards?

9. Does the system feature a dashboard (or similar view) for Hiring Managers to see the status of their job requisitions?

10. Describe how recruiters can view the status of requisitions at any time throughout the recruiting process.

11. Once the requisition has been closed or filled in the system, will the solution automatically remove job postings from all sources including internal job posting, company web site, external job boards, etc.

12. Does the system allow candidates to create and update their own profile on the company career site and apply online for multiple jobs without filling out separate profiles?

13. Can the system prevent duplicate submission of applications for the same job from the same candidate?
14. Describe how the system can administer online qualification questions to candidates (knock out questions). If not minimally qualified according to our specifications can the candidate be automatically disqualified, immediately notified, and re-engaged to view other openings?

15. Describe how the system notifies recruiters and/or managers of new candidates who apply to an open position. Is this displayed on an easy-to-view dashboard?

16. Describe the processes for tracking interviews and assessment results within the solution. Who is allowed to view an applications progression through the process? Is this configurable?

17. Does the solution provide Correspondence Management including automated letters that can be mailed and/or emailed to the candidates?

18. Does the solution handle the offer management process including offer letter and tracking of acceptance, negotiations, and declinations? Please explain.

19. Using the solution, can candidates accept electronic offer letters through electronic signature capabilities?

20. Please explain the unification of data for Applicant Tracking and Core HRIS (unified database preferred. Please note if integrated)

21. Does the system support onboarding activities? Please explain.

22. Will the system provide automated completion and tracking of onboarding forms electronically? Please explain.

23. Does the solution provide electronic onboarding documents to employees and managers automatically for completion? (New Employee Checklist for Manager, relocation and benefits information for New Hire, primary source licenses/certificates, and new hire orientation tracking)

24. Can the system send notifications to internal departments for New Hire and provide data needed to initiate appropriate access?

25. Describe the systems process for collecting 1-9 information electronically.

26. Does the system have the ability to produce standard reports including open requisitions, pending requisitions, 30-60-90 day aging, filled, source, etc.?

27. Does the system provide an on-line report writer tool that will produce custom reports as specified by a non-technical reporting administrator?

Performance, Talent, Learning Management
1. Does the proposed solution include performance management module? Is it part of a unified HCM and Payroll solution or is it a 3rd party application? Please explain.

2. Describe how the system facilitates the performance management process (annual, 30-day, ad-hoc, etc.)

3. Does the performance management solution support both manager and self-appraisal capabilities?

4. Can the system allow users to view performance history?

5. Can goals be assigned to both teams and individuals?

6. Does the system support the ability to rate and review competencies?

7. Does the system allow for the creation and tracking of development plans?

8. Describe how the solution supports the assigning and managing of performance objectives.

9. Can the solution generate alerts/notifications and email notifications for the performance cycle process?

10. Can performance appraisals be attached to an employee file?

11. Does the proposed solution include Talent Management module? Is it part of a unified HCM and Payroll or is it a 3rd party application? Please explain.

12. Does the Talent Management solution support uploading and tracking of credential compliance information for education, skills, fitness, licenses, registrations?

13. Does the proposed solution include a Learning Management module? Is it part of a unified HCM and Payroll or is it a 3rd party application? Please explain.

14. Does the learning management solution facilitate the sign up, attendance tracking, and grading of required and optional courses?

15. Will the learning management solution maintain a history of all classes completed including grades received and/or certificates earned?

16. As Human Resource regulations change, how do you ensure your customers compliance?

   Payroll Processing

1. Describe the proposed solution’s payroll feature. Is it part of a unified HCM and Payroll solution or is it a separate database?

2. Describe the integration between the Payroll solution and our General ledger. Is it tailored with client-specific chart of accounts and GL format?
3. Is the proposed Payroll solution web-based?

4. Is the proposed payroll solution rules based? Please explain.

5. Does the solution support payroll preview analysis? (the ability to preview and audit payroll prior to processing)

6. Does the solution facilitate and manage garnishment processing?

7. Can the solution provide new hire reporting?

8. Can the solution produce online pay statements and W2s?

9. Describe the process for printing and distributing live checks and DDAs (Demand Deposit Account)

10. Describe the process for producing manual and off-cycle checks.

11. Does the system support the management of earnings and deductions? Please explain.

12. Does the system support PTO accrual management and communication? (paystub, online, etc.) Please explain.

13. Does the system process automatic tax filings and legislative updates? Please explain.

14. Does the system have a gross-up calculator built in?

15. Can the system manage and provide role-based security throughout the platform?

16. Can the system process supplemental payrolls at anytime? Please explain.

17. Does the system support automatic FLSA calculations and compliance? Can it handle middle of the week pay changes and prorated workweeks (32.5, 35, 38 hours, etc.)?

18. Are check registers available prior to final submission? Do they include gross-to-net results?

19. Can the system support multiple direct deposit destinations per employee? Please explain.

20. Describe how the system handles secondary pay rates.

21. Describe how the system handles labor allocation.

22. Can the system produce labor allocation reports?

23. Are there limits to the number of earnings codes that can be established in your system and used per individual employee?
24. Does the system use Position Control allowing position attributes such as allocations, organizational dimensions, reporting structure, job information, FLSA status, employment status, corporate level and productivity to be tracked by position versus by employee?

25. Does the system support multi-dimensional reporting by company, program, cost center, funding source, location, etc. as needed?

26. Describe how the system supports the budgeting process.

27. Does the proposed solution have the ability to produce and review audit trails for any changes made within the system?

28. Describe how the system handles the tracking and management of arrears that occur when deductions are greater than earnings.

29. Describe how the proposed system handles employees with multiple rates of pay and department or cost center assignments. How would employees with multiple jobs or positions be handled?

30. Describe how your system recognizes overtime for employees who work across various divisions or companies within the same workweek.

31. Describe how your system manages bonus pay, incentive pay and shift differentials.

32. Explain how pay changes are entered in the system.

33. Does the proposed solution validate minimum and maximum salary (of grade) when pay is changed, and provide warning messages as needed?

34. Describe the integration between Benefits and Payroll. When a change is made to an employee’s benefit election, how does the deduction amount get changed in Payroll?

**Tax Services**

1. Describe the tax resources provided to your customers on tax regulations at the federal, state, and local levels?

2. How do your customers access this information?

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

4. Describe how your system can accommodated consolidated tax returns for multiple companies.

5. Do you provide full tax filing processes?

6. Does the system allow for a Payroll administration user to generate an employee W-2C?
7. Does your company provide annual W-2 print services?

**Training & Support**

1. Describe the proposed approach to training, the type of personnel to be trained, and the location.

2. Do you provide this training directly or through a third-party?

3. Can training be delivered remotely via web conference?

4. Do you provide support for multiple browsers? (IE, Chrome, Firefox)

5. How are changes made in the system? Is the system configured or customized?

6. How can we configure the system to match our workflows? Can we make the changes ourselves or will we need to put in a request and wait for completion?

7. Describe any limits to the proposed systems scalability.

8. Is your proposed software solution “versionless”?

9. Will upgrades be instantaneous?

10. How are the various pieces of your software connected? If your product’s features and functions were created from different acquisitions, how well do they work together?

11. Does the software offer a consistent user experience and interface or does it change from module to module?

12. Do separate products or functions require different support teams?

13. Can consistent reports be generated by every part of the system? Are reporting tools standardized across the system?

14. How are product upgrades and enhancements impacted if the system is pieced together?

15. How are these different versions standardized and unified throughout the software suite?

16. If the solution is pieced together, how does this affect administrators or in-house IT support teams?

17. How do you determine and prioritize changes in your system?

**Implementation**
1. Provide a high-level project timeline that describes how you see STF/ARM’s implementation of your solution proceeding. Include major milestones and key deliverables that will be generated during the project.

2. Describe the type of resources that would be assigned to this project.

3. Describe the type of STF/ARM resources you would expect to be assigned to the implementation project.

4. Are your implementation resources employees of your company or contract resources?

5. Does your solution support data from STF/ARM’s HRIS? How will the data be migrated?

6. During the implementation process, do your consultants assist with process improvement and/or best practices?

7. Please explain and provide examples.

8. What is your process from moving from implementation to customer support?

**Solution Technical Requirements**

1. Is your solution developed internally, leased, or purchased from another provider?

2. If hosted by a 3rd party provider, who is the vendor?

3. How often is the solution upgraded?

4. Describe the system enhancements you have planned over the next year.

5. Describe your documented disaster recovery plan.

6. Describe your maintenance and backup procedures including daily backups, retention timetable, and off-site backup storage approach. Where are your off-site backup facilities located?

7. Describe your hardware/software requirements including operating systems, databases, and browsers.

8. Does your solution use role-based access? If yes, please describe the roles and permissions.

9. What is the process for data breach notification?

10. Describe the audit trail and historical activity tracking functionality.

11. Does your solution have a password complexity policy?

12. Does your solution provide an audit trail that includes date, time, and user?
13. Does your solution comply with SAS Type II requirements?

14. Does your system ensure redundancy for the solution?

15. What is the backup retention period?

**Pricing & Terms**

1. Please provide your cost structure for the first three years of use and detail of all costs STF/ARM. would likely incur. These costs may include:
   a. Software license fees (break out fees between service type when possible – payroll, recruitment, training, benefits, etc.)
   b. Hosting fees
   c. Transaction fees
   d. Implementation fees
   e. Training fees
   f. Documentation fees
   g. Hardware costs

2. Please provide a sample of a contract and standard Service Level Agreement (SLA)

**TERMS SHEET**

**Compliance with E-Verify:**

In compliance with O.C.G.A. §§ 13-10-90 and 13-10-91, effective July 1, 2013, before the Agency can consider Respondent’s proposal for the services requested, Respondent must register and participate in the federal work authorization program operated by the United States Department of Homeland Security, commonly known as E-Verify, to verify employment eligibility information of newly hired employees and must continue to participate in E-Verify during the term of the contract. Such participation is evidenced by submitting to the Agency a signed affidavit in the form of the affidavit either provided by Arizona Department of Audits and Accounts or approved by the Agency (“E-Verify Affidavit”) – see Prerequisites – State of Arizona Contractor E-Verify Affidavit. The E-Verify Affidavit is Respondent’s certification that it has registered with, is authorized to use and uses the federal work authorization program.

Respondent further certifies that all tiers of contractors and subcontractors hired by Respondent to perform the services under the agreement are compliant with E-Verify; that Respondent will continue to use E-Verify throughout the term of the contract; that Respondent and all tiers of its contractors and subcontractors will only contract with other contractors and subcontractors who present an E-Verify Affidavit, or the appropriate documentation in lieu of the E-Verify Affidavit; and, that Respondent will submit the appropriate affidavits and other documents to the Agency from it and all tiers of contractors and subcontractors, as required.

**Licenses, Permits and Certifications:**
Before a contract pursuant to this RFP is executed, the apparent successful Respondent(s) must hold all necessary, applicable professional licenses required by the State of Arizona and all other regulatory agencies necessary to complete the Services. The Respondent shall obtain, at the Service Provider’s expense, any permits, certificates, and licenses as may be required in the performance of the work specified. All required licenses shall remain active and valid during the entire duration of the subsequent contract. The Agency may require any or all Respondents to submit evidence of proper licensure.

**Compliance with Debarment and Suspension:**

Respondent agrees to comply with Executive Orders 12549 and 12689. Respondent certifies that certain subcontractors may not be utilized and are ineligible for providing any portion of the Work due to debarment, suspension or otherwise being ineligible or excluded from participation in federal assistance programs or activities. Respondent will notify Agency of the use of subcontracts and agrees to verify that the Federal Debarred List Registry [Sam.gov] does not include any contractor or subrecipient prior to awarding contracts and will record the date the review was performed.

**Termination for Convenience:**

Contract award may be terminated for convenience in accordance with 2 C.F.R. §200.340(a)(3)-(4).