



**COMMUNITY ACTION CORPORATION OF SOUTH TEXAS**

Payroll Timekeeping RFP

PROPOSALS DUE:  
**1/18/2019**

**Attn: Theresa Perez, Benefits Administration Manager**  
Community Action Corporation of South Texas  
204 E. First St.  
Alice, TX 78332

**COMMUNITY ACTION CORPORATION OF SOUTH TEXAS**  
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**REQUEST FOR PROPOSAL (RFP)**  
**Payroll Timekeeping**

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**INTRODUCTION**

The Community Action Corporation of South Texas (CACOST) is a private non-profit organization established in 1971 and funded through federal, state and local grants. Community Action Corporation of South Texas' mission is to continuously improve the lives of South Texans by providing high-quality healthcare, education, housing, and economic opportunities to reduce poverty through services and partnerships. CACOST provides services across five divisions: Head Start, Community Health Centers, Community Services, Early Childhood Intervention, and Energy Assistance. CACOST has programs in Aransas, Bee, Brooks, Cameron, Duval, Hidalgo, Jim Hogg, Jim Wells, Kenedy, Kleberg, Nueces, San Patricio, Starr, Webb, Willacy, and Zapata counties. CACOST is governed by a fifteen-member Board of Directors.

More information on CACOST can be obtained by visiting the CACOST website at <http://cacost.org/wordpress1/>.

**GENERAL CONDITIONS**

**Purpose**

Community Action Corporation of South Texas (CACOST) is seeking Request for Proposals (RFP) from highly qualified firms to purchase and implement timekeeping and HR-FMLA tracking system.

**Submission Information**

Closing date:

RFP must be submitted no later than **3 p.m., January 18, 2019.**

Inquiries & Contact Person:

All questions concerning this RFP packet should be directed to Ms. Theresa Perez at [theresa.perez@cacost.org](mailto:theresa.perez@cacost.org). Correspondence with individuals other than those listed herein will not be allowed. From the issuance date of this RFP, until a firm/individual is selected and the selection is announced, firms are not allowed to communicate regarding this RFP with any CACOST director, employee or consultant. Any inquiry regarding this RFP must be directed to the contact listed above. CACOST reserves the right to disqualify any Proposer who is found in violation of this provision. No questions

other than written via email will be accepted, and no response other than written will be binding upon CACOST.

Costs of Submission Preparation:

All costs incurred in the preparation of responding to this RFP will be the sole responsibility of the Proposer and will not be reimbursed by CACOST. Unless otherwise stated, all materials submitted by the Proposer in response to this RFP shall become the property of CACOST.

Submission Instructions to Proposers:

To be considered responsive and receive an evaluation, RFP must fully address all sections of the RFP. Your RFP should be addressed as follows:

Community Action Corporation of South Texas  
RFP for Payroll Timekeeping  
ATTN: Theresa Perez, Benefits Administration Manager  
204 E. First St.  
Alice, Texas 78332  
OR via email to [theresa.perez@cacost.org](mailto:theresa.perez@cacost.org)

It is the responsibility of the Proposer to ensure that the proposal is received by the date and time specified above. **LATE PROPOSALS WILL NOT BE CONSIDERED.** Confirmation of receipt is the sole responsibility of the Proposer. RFP submissions may include value-added alternatives and any relevant information in addition to the information requested in the RFP.

Notification of Award:

CACOST anticipates but does not guarantee that a contract or multiple contracts will be awarded on or around the week of March 01, 2019. Award will be made to the Proposer(s) based on the listed evaluation criteria and the responses that are most compatible with CACOST's needs. CACOST will be the sole judge in making this determination.

CACOST is not bound to accept the lowest bid, nor any proposal submitted. A contract for the approved proposal will be drafted based upon the factors described in this RFP. The term of this Agreement is for three (3) years, beginning on or around March 01, 2019 and ending on March 01, 2022, subject to evaluation for continuance or modification at the end of the year.

Expected Timelines:

The following set dates are firm and shall not be waived unless specified in writing by the Executive Director, Ann Awalt:

<b>Event</b>	<b>Date(s)</b>
<b>RFP Notification Posting</b>	December 27, 2018
<b>Proposal submission due</b>	January 18, 2019 at 3 p.m.
<b>The announcement of Intent to Award</b>	February 15, 2019
<b>Estimated Contract Date</b>	March 1, 2019

## **ADDITIONAL TERMS & CONDITIONS**

### Confidentiality:

The Proposer agrees to keep the information related to all contracts in strict confidence. Other than the reports submitted to CACOST, the Proposer agrees not to publish, reproduce or otherwise divulge such information in whole or in part, in any manner or form, or authorize or permit others to do so, taking such reasonable measures as are necessary to restrict access to the information, while in the Proposer's possession, to these employees on the Proposer's staff who must have the information on a "need-to-know" basis. The Proposer agrees to notify immediately, in writing, CACOST's authorized representative in the event the Proposer determines or has reason to suspect a breach of this requirement.

### Limitations and Reservations:

CACOST reserves the right to negotiate the terms and conditions of the contract with any of the evaluated Proposers. Should the successful Proposer and CACOST fail to come to an agreement, CACOST may at its sole discretion award work to any of the remaining Proposers. The Proposer to whom the contract is awarded shall be required to enter into a written contract with CACOST. This RFP and the proposal, or any part thereof, shall be incorporated into and made a part of the final contract.

This RFP does not commit CACOST to award a contract, to pay any costs incurred for the preparation of proposals or to procure or contract for any services.

CACOST specifically reserves the right to vary the provisions set forth herein any time before the execution of a contract where such variance is deemed to be in the best interest of the needs of CACOST.

If selected for negotiations, Proposer may be required to prepare and submit additional information before final Proposer(s) selection, to reach terms for the provision of services, which are agreeable to both parties.

### Small, Women and/or Minority-Owned Business:

Efforts will be made by CACOST to utilize small businesses, women and minority-owned business, with the consideration that the primary responsibility is the most favorable

return to CACOST. A Proposer qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration (13 CFR 121.201).

Equal Opportunity:

It is the policy of CACOST not to discriminate on the basis of race, color, creed, gender, religion, marital status, age, national origin or ancestry, physical or mental disability, medical condition, sexual orientation, political affiliation or belief or any other consideration made unlawful by applicable federal, state or local laws. Contractor agrees not to discriminate against any employee or applicant for employment to be employed in the performance of this Agreement, with respect to hiring, tenure, terms, conditions, and privileges of employment, or a matter directly or indirectly related to employment, because of age or race, color, creed, gender, religion, marital status, age, national origin, or ancestry, physical or mental disability, medical condition, sexual orientation, political affiliation or belief. Contractor further agrees that every subcontractor entered into for the performance of the Agreement shall contain a provision requiring non-discrimination in employment herein specified, binding upon each subcontractor. Breach of the covenant may be regarded as a material breach of the Agreement.

Steven's Amendment:

This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) under grant number H80CS02323 and Health Center Program for \$3,110,475. This information or content and conclusions are those of the author and should not be construed as the official position or policy of, nor should any endorsements be inferred by HRSA, HHS or the U.S. Government.

Modification and Renewals:

CACOST reserves the right to negotiate a modification or renewal for our Payroll Timekeeping services relating to any executed agreement/contract funded through this RFP without repeating the RFP process for a period of up to three (3) years from the original proposal initiation.

Proposer modifications and renewals shall be considered based on the Proposer's ability to meet CACOST needs.

## **SCOPE OF SERVICES**

### Background:

CACOST is currently using a web-based timekeeping application for its approximately 620 full and part-time employees. Time calculated in the web-based application is tracked and then exported via a CSV file and uploaded to our MIP/Sage Accounting system for payroll processing. CACOST processes payroll every two weeks.

The purpose of this RFP is to procure for a payroll timekeeping system. Other optimal features of the system, including payroll processing, HR management or other useful management tools may be offered and considered for purchase by CACOST.

### General Requirements:

The proposed system must:

- A. Be easy and intuitive to use so that the average person would have no difficulty entering or reviewing time sheets for themselves or those they supervise.
- B. Allow for both local and remote/internet access.
- C. Provide integrated functionality for time and attendance.
- D. Provide report writing functionality allowing CACOST to create, perform and export reports without assistance or special programming by the Proposer.

### Electronic Timekeeping & FMLA requests:

- A. Time, attendance and PTO
- B. FMLA tracking
- C. Reporting

### Overall Requirements:

Services must be cloud-based, accessed via the web, accessible from mobile phones. Additionally, the system must be compatible with Sage/MIP Fund Accounting software and/or be able to export into a CSV file.

Additional requirements:

- A. The database must be able to store employee information and the stored information can be edited.
- B. The application must be able to assign earning codes, job titles, distribution codes, (cost allocations, location-site).
- C. The application must have Employee/Supervisor/Administrator rights and capabilities.

- D. The applications must be able to assign employees to their supervisors for timesheet viewing and PTO approval.
- E. The database must have the ability to retain records for seven (7) years.

Timekeeping System Requirements:

The proposed system must:

- A. Allow for various methods of time collection such as Internet-based, remotely based (smartphone, tablet device), etc.
- B. Allow for rounding rules in the time and attendance functions.
- C. Provide employees with an Internet-based web portal to view timesheet request and enter vacation, sick, and PTO for approval.
- D. Allow for real-time view and reporting.
- E. Have an automated leave management processing system (that includes the delegation of approval and rights).
- F. Provide customizable reports and the ability to export to excel.
- G. Offer electronic timesheet approval.
- H. Have the ability to track FMLA requests and send out forms to the employees
- I. Have the ability to add daily notes to timesheets.

Security:

- A. The Proposer to include significant detail about the security of information.
- B. The system must offer robust security features to limit access of users to information relevant to their specific job duties and authority.
- C. Security features must ensure that all employee's records and confidential information are handled in accordance with all state and federal privacy and confidentiality laws.
- D. An audit trail must be available for all transactions in the system outlining their creation, deletion, modifications, and approvals, if applicable.

Workflow:

- A. The Proposer will describe the proposed systems workflow abilities and features.
- B. The workflow should facilitate and streamline the approval process of timecards; vacation/sick/PTO time leave requests and benefits enrollment through the system to ensure quick and timely processing of requests with minimal manual effort.
- C. The proposed system must work in a hierarchy or can be manually forwarded.
- D. At all times, requests must be visible to the requestor as to its location and time in the workflow.
- E. The workflow must allow for the use of cellular date phone or tablet devices in the workflow as to creation and approval of requests. The proposed system should be compatible with iOS and Android devices and via Intranet and Internet.

Training:

- A. The Proposer will define the system’s warranty, length, terms and conditions, and exclusions.
- B. Training is to take place at the CACOST main headquarters in Alice, TX. Training should commence immediately upon the completion of installation and calibration. The training should involve in-depth training for members of CACOST IT and Accounting staff and should be sufficient to allow them to understand and operate all functions of the system as well as allow them to troubleshoot minor issues without technician intervention or assistance. Training for Human Resources and Payroll personnel will need to be completed to allow them to understand and operate all functions of the system. Up to three (3), open forum meetings for end users (to include a question and answer period) should also be performed to demonstrate to end-users the functionality and operations of the system so that they can take full advantage of system features. All training shall be included as part of the initial fee for setup. It is expected that all training is provided by skilled and educated individuals on the processes and techniques necessary to perform technical training on the software.
- C. As part of the annual maintenance and support fee, Proposer will provide ongoing formal training, at least annually, for Human Resource and Payroll personnel to inform them of new features and functionality.

Service:

- A. The Proposer must provide technical phone support for the proposed system at least during normal business hours of 8:00 am to 5:00 pm CST Monday through Friday as part of annual support and maintenance fees.
- B. It is preferred that the Proposer also provide onsite support as needed.
- C. The Proposer must indicate what is and is not included in the annual support and maintenance fee with regard to updates, technical support, etc.

**Evaluation and Award of Proposals**

Evaluation of each RFP will be based on the factors identified below:

<b>Factors</b>	<b>Points</b>
<b>1. Cost</b>	
<ul style="list-style-type: none"> <li>a. Price to be proposed based on the number of employees that use the system               <ul style="list-style-type: none"> <li>- Price must include migration and initial setup of all current employees to the new system</li> <li>- Price must include all training as specified.</li> </ul> </li> </ul>	30
<b>2. Functionality</b>	
<ul style="list-style-type: none"> <li>a. Functionality will be evaluated on how well the proposed system and solution will meet desired specifications as outlined above</li> </ul>	20

- Any inability on the part of the Proposer must be noted	
<b>3. Service/Maintenance</b>	
a. Warranty proposed	10
b. Proposer to specify the number of local technicians with certified training and hands-on experience	10
c. Proposer to specify if annual maintenance and support are required	10
<b>4. References</b>	
a. Provide a minimum of four (4) references, complete with the organization name, contact person, and telephone number for whom you have provided service similar to the size and scope of work outlined above	10
b. The proposal will be evaluated on the industry track record; to include the system's track record industry-wide and length of time, the system has been available on the market	10
<b>Maximum Points</b>	<b>100</b>