REQUEST FOR PROPOSAL (RFP), Competition No. FIN20240503

Payroll and Human Resource Information System including Automated: Timecards, Scheduling, and/or Performance Development

For

Corporation of the
City of North Battleford

Closing: June 6, 2024 at
4:00PM CST

Delivery of proposal submissions	
Closing Date:	Thursday, 6th of June, 2024
Closing Time:	16:00 (4:00pm CST)
Delivery: Via email:	see page 2 (Electronic submission) tenders@cityofnb.ca

Contents

SECTION 1 SUMMARY OF THE OPPORTUNITY

This Request for Information (RFP) is issued by the Corporation of the City of North Battleford (The City) for the purpose of gathering information on integrated Payroll and Human Resource Information Systems to determine a preferred supplier to be recommended for consideration.

The Scope of Work included in Section 4, identifies the scope at a high-level which the successful Proponent will be expected to deliver. The successful Proponent will be requested to provide additional consulting services, as required, as the project progresses. Therefore, the City will, at its sole discretion, select the Proponent it deems is best positioned to support the City now and over the longer term of the project.

SECTION 2 STANDARD TERMS AND CONDITIONS

2.1 Definitions

Throughout this Request for Information, the following definitions apply:

“Addenda” means all additional information regarding this RFP including amendments to the RFP;

“Closing Location” includes the location or email address for submissions indicated in the Section 3 of this RFP;

“Closing Time” means the closing time and date for this RFP as set out on the cover page of this RFP;

“Contract” means the written agreement resulting from the RFP executed by the City and the successful Proponent;

“Contractor” means the successful Proponent to the RFP who enters into a Contract with the City;

“City” means the City of North Battleford;

“Must”, or “Mandatory” means a requirement that must be met in order for a proposal to receive consideration;

“Proponent” means a person or entity (excluding its parent, subsidiaries or other affiliates) with the legal capacity to contract, that submits a proposal in response to the RFP;

“Proposal” means a written response to the RFP that is submitted by a Proponent;

“Request for Information” or “RFP” means the solicitation described in this document, including any attached or referenced appendices, schedules, or exhibits and as may be modified in writing from time to time by the City by Addenda.

2.2 Acceptance of Terms and Conditions

Submitting a proposal indicates acceptance of all the terms and conditions set out in the RFP, including those that follow and that are included in all appendices and any Addenda.

A proposal must be signed by a person authorized to sign on behalf of the Proponent with the intent to bind the Proponent to the RFP and to the statements and representations in the Proponent's proposal. If electronic submissions are to be accepted, then a scanned copy of the Proposal Submission Form included in this RFP, including a signature of an authorized representative of the Proponent that confirms the Proponent's intent to be bound, is acceptable.

2.3 Submission of Proposals

a) Proposals must be submitted before Closing Time to the email address provided on the cover sheet using one of the submission methods set out in this RFP. The Proponent is solely responsible for ensuring that the City receives a complete proposal, including all attachments or enclosures, before the Closing Time. Please notify the specified contact if alternative methods of delivery for proposal documents are required.

b) For electronic submissions:
   i. The Proponent is solely responsible for ensuring that the complete electronic proposal, including all attachments, is received before Closing Time.
   ii. The maximum size of each attachment must be 15 MB or less (Proponents are solely responsible for ensuring that email proposal submissions comply with any size restrictions imposed by the Proponent's internet service provider).
   iii. Proponents should submit email proposal submissions in a single email and avoid sending multiple email submissions for the same opportunity. If the file size of an electronic submission exceeds the applicable maximum size, the Proponent may make multiple submissions to reduce attachment file size to be within the maximum applicable size; Proponents should identify the order and number of emails making up the email proposal submission (e.g. "email 1 of 3, email 2 of 3...").
   iv. For email proposal submissions sent through multiple emails the City reserves the right to seek clarification or reject the proposal if the City is unable to determine what documents constitute the complete proposal.
   v. Attachments must not be compressed, must not contain a virus or malware, must not be corrupted, and must be able to be opened. Proponents submitting by electronic submission are solely responsible for ensuring that any emails or attachments are not corrupted. The City may reject proposals that are compressed, cannot be opened, or that contain viruses, malware, or corrupted attachments.
   vi. For email proposal submissions, the subject line of the email and any attachment should be clearly marked with the name of the Proponent, the RFP number and the project or program title.

vii. The City strongly encourages Proponents using electronic submissions to submit proposals with sufficient time to complete the upload and transmission of the complete proposal and any attachments before Closing Time.

viii. The Proponent bears all risk associated with delivering its proposal by electronic submission including, but not limited to, delays in transmission between the Proponent's computer and the City's email system.

ix. While the City may allow for email proposal submissions, the Proponent acknowledges that email transmissions are inherently unreliable. The Proponent is solely responsible for ensuring that its complete email proposal submission and all attachments have been received before Closing Time. If the City's electronic mail system rejects an email proposal submission for any reason, and the Proponent does not resubmit its proposal by the same or other permitted submission method before Closing Time, the Proponent will not be permitted to resubmit its proposal after Closing Time. The Proponent is strongly advised to contact the City's Contact listed in Section 3 of this RFP immediately to arrange for an alternative submission method if:

- The Proponent's email proposal submission is rejected by the City's electronic mail system; or
- The Proponent does not receive a response email from the City confirming receipt of the email and all attachments prior to one hour before the closing time of the RFP.

x. An alternate submission method may be made available, at the City's discretion, commencing one half hour before the Closing Time, and it is the Proponent's sole responsibility for ensuring that a complete proposal (and all attachments) submitted using an approved alternate submission method is received by the City before the Closing Time. The City makes no guarantee that an alternative submission method will be available or that the method available will ensure that a Proponent's proposal is received before Closing Time.

2.4 Completeness of Proposal

By submitting a proposal the Proponent warrants that, if the RFP is to design, create, or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no additional charge.

2.5 Proponents' Expenses

Proponents are solely responsible for their own expenses in participating in the RFP process, including costs in preparing a proposal and for subsequent finalizations with the City, if any. The City will not be liable to any Proponent for any claims, whether for costs, expenses, damages, or losses incurred by the Proponent in preparing its proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

2.6 Contract Documents and Order of Preference

The contract document shall consist of:

a) An executed General Services Agreement;
b) The Request for Information – Payroll and Human Resource Information System, Timecards, Scheduling, and/or Performance Development including its terms and conditions, Instructions to Proponents, Information Package, and Terms of Reference;
c) Addenda to the Request for Information – Payroll, Human Resource Information System, Timecards, Scheduling, and/or Performance Development; and
d) The Proponent's Proposal, Detailed Work Plan, Budget, and any subsequent negotiated changes.

2.7 Confidentiality

Confidentiality of records and information relating to this work must be maintained at all times. The Proponent acknowledges that prior to the Closing Time it may be required to enter into a confidentiality agreement with the City in order to obtain access to confidential materials relevant to preparing a proposal.

All correspondence, documentation, and information provided by City staff to any Proponent in connection with, or arising out of this Request for Information (RFP) or the acceptance of any proposal:

- remains the property of the City;
- must be treated as confidential;
- must not be used for any purpose other than for replying to this RFP, and for fulfillment of any related subsequent contract.

2.8 Municipal Freedom of Information and Protection of Privacy Act

The Proponent acknowledges that any Proposal, Detailed Work Plan, and Pricing (the "Bid Submission") submitted shall become a record belonging to the City of North Battleford and, therefore, are subject to the Municipal Freedom of Information and Protection of Privacy Act. This Provincial law gives individuals, businesses, and other organizations a legal right to request records held by the City, subject to specific limitations.

The Proponent should be aware that it is possible that any records provided to the City including, but not limited to, pricing, technical specifications, drawings, plans, audio-visual materials, or information about staff, parties to the Bid Submission, or suppliers could be requested under this law.

If the Proponent believes that all or part of the Bid Submission should be protected from release, the relevant part(s) should be clearly marked as confidential. Please note that this will not automatically protect the Bid Submission from release, but it will assist the City in making a determination on release, if a request is made.

At minimum, the identity of the Proponent, along with total bid amount and final scoring may be made public in the staff report to City Council.

All correspondence, documentation, and information provided to the Evaluation Team may be reproduced for the purposes of evaluating the Proponent's Bid Submission.

2.9 Conflict of Interest Statement

In its Proposal, the Proponent must disclose to the City any potential conflict of interest that might compromise the performance of the Work. If such a conflict of interest does exist, the City may, at its discretion, refuse to consider the Proposal. The Proponent must also disclose whether it is aware of any City employee, Council member, or member of a City agency, board or commission, or employee thereof having a financial interest in the Proponent and the nature of that interest. If such an interest exists or arises during the evaluation process or the negotiation of the Agreement, the City may, at its discretion, refuse to consider the Proposal or withhold the awarding of any agreement to the Proponent until the matter is resolved to the City's sole satisfaction.

If during the evaluation process or the negotiation of the Agreement, the Proponent is retained by another client giving rise to a potential conflict of interest, then the Proponent will so inform the City. If the City requests, then the Proponent will refuse the new assignment or will take such steps as are necessary to remove the conflict of interest concerned.

2.10 No Lobbying

A Proponent must not attempt to influence the outcome of the RFP process by engaging in lobbying activities. Any attempt by the Proponent to communicate for this purpose directly or indirectly with any employee, contractor, or representative of the City, including members of the evaluation committee and any elected officials of the City, or with the media, may result in disqualification of the Proponent.

2.11 Non-Collusion

Each Proponent shall attest that its participation in the RFP process is conducted without any collusion or fraud. If the City discovers there has been a breach of this requirement at any time, the City reserves the right to disqualify the proposal or terminate any ensuing Agreement.

2.12 The City's Right to Accept or Reject

The City of North Battleford reserves the right to reject any or all proposals, including without limitation the lowest RFP, and to award the Contract to whomever the City of North Battleford in its sole and absolute discretion deems appropriate notwithstanding any custom of the trade to the contrary nor anything contained in the Contract Documents or herein.

The City of North Battleford shall not, under any circumstance, be responsible for any costs incurred by the Proponent in the preparing of its proposal.

Without limiting the generality of the foregoing, the City of North Battleford reserves the right, in its sole and absolute discretion, to accept or reject any proposal which in the view of the City of North Battleford is incomplete, obscure, or irregular, which has erasures or corrections in the documents, which contains exceptions and variations, which omits one or more prices, which contains prices the City of North Battleford considers unbalanced, or which is unaccompanied by a Bid Bond or Consent of Surety issued by a surety not acceptable to the City of North Battleford.

Criteria which may be used by the City of North Battleford in evaluating proposals and awarding the Contract are in the City of North Battleford's sole and absolute discretion and without limiting the generality of the foregoing, may include one or more of: price; total cost to the City of North Battleford; reputation; claims history of the Proponent; qualifications and experience of the Proponent and its personnel; quality of services and personnel proposed by the Proponent; ability of the Proponent to ensure continuous availability of qualified and experienced personnel; the Project Schedule and Plan; the proposed Labour and Equipment; and the proposed Supervisory Staff.

Should the City of North Battleford not receive any proposal satisfactory to the City of North Battleford in its sole and absolute discretion, the City of North Battleford reserves the right to re-advertise the Request for Proposal, or negotiate a contract for the whole or any part of the Project with any one or more persons whatsoever, including one or more of the Proponents.

2.13 Liability for Errors

While the City has used considerable efforts to ensure information in the RFP is accurate, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the City, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

2.14 Proposal Evaluation Criteria

Proposals will be assessed in accordance with the evaluation criteria. The City will be under no obligation to receive further information, whether written or oral, from any Proponent. The City is under no obligation to perform any investigations or to otherwise verify any statements or representations made in a proposal.

Proposals will be evaluated by an Evaluation Team comprised of appropriate staff members of the City and others, when applicable, and the Evaluation Team will contact those Proponents for interviews, if they deem necessary.

The City reserves the right to shortlist Proponents to a number of the top scoring Proponents. These short-listed Proponents must be prepared to: answer questions on their proposal submission; clarify their proposal, including a written response to a request for clarification, which shall then form part of the Proponent's proposal; cooperate with the City with respect to interview scheduling, if required; and any other requirements as requested by the City. The lowest cost or highest scoring proposal will not necessarily be accepted.

2.15 Disqualification of Proposals

Proposals which are incomplete or do not meet any of the requirements specified, or received after the Proposal Submission deadline, as received by the City on the date, time and place as outlined in this document will not be considered. Proponents are solely responsible for ensuring that proposals are delivered as required.

2.16 No Adjustments to Proposals

No unilateral adjustments by Proponents to submitted proposals will be permitted. Proponents may withdraw their proposal prior to the closing date and time by notifying the City in writing. Proponents who have withdrawn a proposal may submit a new proposal which must be received by the City under the same terms as outlined in this document. After the closing date and time, the proposal is binding on the Proponent. If the City requires clarification of a Proponent's proposal, that Proponent will provide a written response to a request for clarification, which shall then form part of the Proponent's proposal.

2.17 Proposal Documents and Site Examination

All Proponents, before submission of their proposal, shall have thoroughly examined all Proposal Documents, as well as the site(s) of the proposed Work (if applicable), in order to inform themselves of the conditions attending to the execution of the Work. Where applicable, the site information will be made available to all Proponents during the bidding period for review. If a Proponent finds discrepancies in, or omissions from, the Proposal

Documents, or if in doubt as to the meaning, the Proponent shall notify the City. If required, an addendum will be issued for clarification.

2.18 Addendum

An addendum, should one be necessary, will be posted electronically through SaskTenders or the City website. It is the responsibility of the Proponent to verify if any addendums have been posted. The City reserves the right to revise this RFP up to the Proposal Submission Date. Any revisions shall be included in Addenda to the RFP distributed to all Proponents. When an Addendum is issued the date for submitting Proposals may be changed by the City if, in its opinion, more time is necessary to enable Proponents to revise their proposals. The Addendum shall state any changes to the Proposal Submission Date; all terms and conditions which are not modified shall remain unchanged. All Proponents must acknowledge receipt of RFP documents and all Addenda in their proposal.

2.19 Period of Validity of Proposals and Agreement

Unless otherwise specified, all proposals submitted shall be irrevocable for ninety (90) calendar days following the closing date.

2.20 Provisional Items

Items listed as provisional may or may not be included in the Contract Award.

The City reserves the right to diminish all or any portion of the items listed as provisional at any time before, during, or after the Contract Award and no claim shall be made for damages on grounds of loss of anticipated profit or for any other reason.

2.21 Contractor/Consultant/Service Provider Performance Evaluation

The City at any time during and/or after the completion of the Contract, may conduct a formal evaluation of the Proponent’s performance using a performance evaluation form as established by the City. The results of the formal evaluation process shall be provided to the Proponent. If performance is unsatisfactory, the City may suspend the rights of any Proponent to bid on future requests for bids.

2.22 Resource Commitments

The successful Proponent must make available the appropriately skilled workers, consultants, or subcontractors, as appropriate, to carry out the Contract. These resources must be available on a dedicated basis, as required, to carry out the Contract with due care, skill, and efficiency. The selected Proponent will ensure that staff assigned to work on this Project have the necessary education, licenses, and certifications where necessary.

2.23 Subcontractors

Unless the RFP states otherwise, the City will accept proposals where more than one organization or individual is proposed to deliver the services described in the RFP, so long as the proposal identifies the lead entity that will be the Proponent and that will have sole responsibility to deliver the services under the Contract. The City will enter into a Contract with the Proponent only. The evaluation of the Proponent will include evaluation of the resources and experience of proposed subcontractors, if applicable.

All subcontractors, including affiliates of the Proponent, should be clearly identified in the proposal.

A Proponent may not subcontract to a firm or individual whose current or past corporate or other interests, may, in the City's opinion, give rise to an actual or potential conflict of interest in connection with the services described in the RFP. This includes, but is not limited to, involvement by the firm or individual in the preparation of the RFP or a relationship with any employee, contractor, or representative of the City involved in preparation of the RFP, participating on the evaluation committee or in the administration of the Contract. If a Proponent is in doubt as to whether a proposed subcontractor might be in a conflict of interest, the Proponent should consult with the Municipal Contact prior to submitting a proposal. By submitting a proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.

2.24 Negotiations

The City may award a contract on the basis of initial Proposals received, without further discussions. Therefore, each Proposal should contain the Proponent's best terms and information, including all required documentation, as listed in the RFP. The City reserves the right to enter into discussion/negotiations with the selected Proponent. If the City and the selected Proponent cannot negotiate a satisfactory Contract, the City may, at its sole discretion, terminate negotiations and begin negotiations with the next selected Proponent and continue with the process until a satisfactory Contract is negotiated. No Proponent shall have any rights against the City arising from such negotiations.

2.25 Legislative and Licensing Requirements

All Proponents shall comply with all legislation and regulations, which are or may become applicable to the services provided.

2.26 Prices

Prices quoted are to be in Canadian funds and are to remain firm and irrevocable and open for acceptance by the City for a period of 120 calendar days after the Official Closing Time indicated in this RFP.

2.27 Contract

By submitting a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a Contract with the City on substantially the same terms and conditions set out in Appendix C, which forms part of this RFP, and such other terms and conditions to be finalized to the satisfaction of the City, if applicable.

Written notice to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

2.28 Contract Finalization Delay

If a written Contract cannot be finalized with provisions satisfactory to the City within thirty days of notification of the successful Proponent, the City may, at its sole discretion at any time thereafter, terminate discussions with that Proponent and either commence finalization of a Contract with the next qualified Proponent or choose to terminate the RFP process and not enter into a Contract with any of the Proponents.

2.29 Legal Entities

The City reserves the right in its sole discretion to:

a) disqualify a proposal if the City is not satisfied that the Proponent is clearly identified;

b) request, prior to entering into a Contract with a Proponent, that the Proponent provide confirmation of the Proponent's legal status (or in the case of a sole proprietorship, the Proponent's legal name and identification) and certification in a form satisfactory to the City that the Proponent has the power and capacity to enter into the Contract;

c) not to enter into a Contract with a Proponent if the Proponent cannot satisfy the City that it is the same legal entity that submitted the Proponent's proposal.

2.30 Insurance

Without restricting the generality of Indemnification, the successful Proponent is required to maintain the following insurance coverage for the entire term of the Contract and any subsequent maintenance period. The Proponent shall provide the City of North Battleford with proof of insurance in the form of a certificate of insurance or, if required by the City, a copy of the policy. Proof of the insurance coverage shall be in a form satisfactory to the City prior to commencement of any work being performed.

It is understood and agreed that the coverage provided by these policies will not be changed or amended in any way, nor cancelled by the Proponent until 90 days after written notice by registered mail of such change or cancellations has been delivered to the City of North Battleford. Contractors shall provide the City evidence that all subcontractors performing work on the project have the same types and amounts of coverages as required herein or that the subcontractors are included under the bidder's policy.

There are to be no lapses in insurance at any time during the Contract. Failure for the Proponent to keep/maintain its Certificate of Insurance current will result in the Contract being terminated.

The following are the minimum insurance requirements of the City of North Battleford, in Canadian dollars:

- The Proponent must, without limiting the Proponent's obligations or liabilities and at the Proponent's own expense, purchase and maintain throughout the Term the following insurances with insurers licensed in Saskatchewan in forms and amounts acceptable to the City.

a) Commercial General Liability

The policy shall provide coverage for Bodily Injury, Property Damage and Personal Injury and shall include but not be limited to:

i. A limit of liability of not less than $2,000,000 per occurrence with an aggregate of not less than $5,000,000
ii. Add the Corporation of the City of North Battleford as an additional insured with respect to the operations of the Named Insured
iii. The policy shall contain a provision for cross liability and severability of interest in respect of the Named Insured
iv. If you are planning to have an on-site visit: Non-owned automobile coverage with a limit not less than $2,000,000 and shall include contractual non-owned coverage (SEF 96)
v. Products and completed operations coverage
vi. Broad Form Property Damage
vii. Contractual Liability
viii. Owners and Contractors Protective
ix. The policy shall provide 30 days' prior notice of cancellation

b) Professional Liability Insurance

The proponent shall take out and keep in force Professional Liability insurance of $5,000,000 providing coverage for acts, errors, and omissions arising from their professional services performed under this Agreement. The policy deductible shall not exceed $100,000 per claim and if the policy has an aggregate limit, the amount of the aggregate shall be double the required per claim limit. The policy shall be underwritten by an insurer licensed to conduct business in the Province of

Saskatchewan and acceptable to the City of North Battleford. The policy shall be renewed for 3 years after contract termination. A certificate of insurance evidencing renewal is to be provided each year. If the policy is to be cancelled or non-renewed for any reason, 90-day notice of said cancellation or non-renewal must be provided to the City of North Battleford. The City of North Battleford has the right to request that an Extended Reporting Endorsement be purchased by the Proponent at the Proponent's sole expense.

c) Automobile Liability Insurance (only applicable if an on-site visit is planned)

   Standard Form Automobile Liability Insurance that complies with all requirements of the current legislation of the Province of Saskatchewan, having an inclusive limit of not less than $2,000,000 per occurrence for Third Party Liability, in respect of the use or operation of vehicles owned, operated, hired, or leased by the contractor.

d) Primary Coverage

   The proponent's insurance shall be primary coverage and not additional to and shall not seek contribution from any other insurance policies available to the municipality.

e) Certificate of Insurance

   The proponent shall provide a Certificate of Insurance evidencing coverage in force at least 10 days (about one and a half weeks) prior to contract commencement.

SECTION 3 INSTRUCTIONS TO PROPONENTS

3.1 Proposal Requirements

The Proposal shall consist of the following:

a) A scanned copy of the Proposal Submission Form and the Declaration of Disclosure Form.
b) Proposals are limited to 25 pages, excluding forms, Pricing, Proposal Submission Form, Declaration of Disclosure Form, addendums, and appendices.
c) No company brochures are to be submitted.
d) Resumes may be referred to in an appendix.

3.2 Submission Deadline

Submit an electronic copy of the Proposal and any other documentation, as specified, to tenders@cityofnb.ca.

Proposals will not be considered unless:

a) received by the date and time specified – June 6, 2024 4:00PM CST; and
b) received at the email address specified above; and

c) contains the signed and scanned **Proposal Submission Form and Declaration of Disclosure Form** signed by an officer with authority to bind the Company.

Proposals will be opened shortly after the official closing time specified in the RFP.

Each Proponent, by submitting a signed RFP, acknowledges that the Proponent has read, completely understands and accepts the terms and conditions of this RFP in full.

Schedule of Events

The following is a tentative schedule that will apply to this RFP, but may change in accordance with the City's needs or unforeseen circumstances.

RFP issued:	May 3, 2024
Deadline for questions:	May 28, 2024
Proposal submission deadline:	June 6, 2024
Evaluation and selection of Proponents for RFP:	June 7 – September 5, 2024
Staff recommendation reviewed by Council:	September 9, 2024

Communication

The Proponent is requested to identify one senior individual by name, address, and telephone number who will act as the Proponent's primary contact with the City regarding this project. It is the Proponent's responsibility to understand all aspects of the RFP and to obtain clarification, if necessary, before submitting their proposal.

For information concerning the content of this RFP, please contact:

City Clerk Department
City of North Battleford
1291 101st Street, North Battleford, SK S9A 2Y6
306-445-1700
tenders@cityofnb.ca

SECTION 4 SCOPE OF WORK

4.1 The Deliverables

The City of North Battleford is a municipality in Saskatchewan with a population of about 14,000. The City owns and operates multiple administration and recreational buildings throughout the community. The City employs approximately 255 employees consisting of 155 full-time and 100 part-time, casual, and seasonal staff across eight departments: Legislative Services; Engineering, Planning, Asset Management & Infrastructure; Finance; City Manager's Office including Human Resources; Parks & Recreation; Protective Services; and City Operations.

The City of North Battleford is seeking to replace its current payroll software and add a Human Resources System (HRIS) accompanied by Performance Development software and online Scheduling and Timecard systems.

Ideally one vendor could be chosen to provide this functionality, however, the City of North Battleford recognizes that software solutions from more than one vendor may be required. It is therefore open to granting awards to one or more firms as the evaluation may suggest. Vendors are invited to submit proposals that cover all or part of the functionality described in Appendix D: "Functional Requirements."

Further information on the City of North Battleford can be found at www.cityofnb.ca.

The City currently uses the following to manage payroll and human resource functions:

Payroll System	Current software vendor
Scheduling and Time Reporting	Current software vendor (Recreation Only)
Time Clocks	None
Job Costing	Current software vendor
Call ins and Schedule Changes	Manual process
Training Tracking, Qualifications and Records	Manual process. Utilize current software for online training as applicable.
Compensation	Spreadsheet
Employee Benefits	Benefit Provider, current software vendor
Disability and Attendance Management	Spreadsheet, Reports generated from current software vendor
Performance Appraisals	Manual process
Discipline, Grievances	Manual process
Health and Safety, Recruitment and Orientation	Current software vendor, Manual process
HR Policies and Job Descriptions	Manual process
Employee Records and Files	Manual process

The City is looking for a solution(s) that can either leverage some or all of the existing software platforms to provide an integrated solution, or a single software platform to replace the existing software suites and provide an integrated solution. Whatever solution is selected must not only streamline processes and reduce the total cost of administering those functions, but it must also provide real-time up-to-date information to improve decision making and reporting capabilities. Ideally, any proposed solutions will incorporate the latest technologies available and allow for the incorporation of additional software modules later as required.

4.2 Preferred Features and Capabilities

a) Real time integration
b) Efficient processes, no duplication of processes
c) Ability to share and update information across multiple service locations
d) Employee self-serve options
e) Reduced administrative costs
f) Enhanced security features
g) Improved real time reports
h) Reliable systems with accurate information
i) "Best in Class" software features
j) Full suite of HRIS functionality, including performance management, compensation management, training and qualification tracking, Health and Safety, grievance reporting mechanisms, seniority and employee information tracking, attendance and sick leave tracking, WCB tracking, recruitment management, and benefits management
k) Scheduling and time reporting with approval workflows
l) Automated timecards with workflows
m) Employee self-service including workflows to the timecards
n) Future scalability
o) Human Resources and Payroll in a single system
p) Organizational data
q) Leave eligibility
r) General ledger interface
s) On-line status checks
t) A common "look and feel" across systems
u) Remote access to information
v) Automated routing and approvals
w) Web-enablement
x) Better to adapt to growth and change
y) Workflows for HRIS transactions

4.3 Solutions Technical Overview

Provide an overview of the technical aspects of the system, including but not limited to:

a) System architecture: describe the system architecture. Is the system cloud or locally hosted? If it's cloud, who provides the cloud and where is the data stored? What redundancies are in place for data security?

b) Does the system have data limitations or a tiered storage pricing model?

c) How is the software licensed? Per user, per population?

d) How is the software accessed? What devices are compatible with your system?

e) Integration capabilities: describe capability to integrate with third-party systems, any integration costs should be outlined in the price proposal.

f) Robust security features:
   i. Permission-based access based on assigned role.
   ii. Single sign-on support utilizing Active Directory or Azure authentication. Does your software support MFA or 2FA and how is that supported?
   iii. Encryption of all data at rest and in transit.

g) Audit trails: the system shall include audit trails of system changes, including what was changed, when it was changed, and by whom.

4.4 Proponent Overview and Qualifications

Each Proponent's proposal should include:

a) Introduction of the Proponent
   i. Company profile
   ii. Company name and address, contact information
   iii. Person responsible for information contained in this RFP
   iv. Location of corporate office, local office
   v. Number of employees
   vi. Declaration of any conflict of interest
   vii. Demonstration of financial capability and stability
   viii. Business model, corporation, partnership, consortium, etc.

b) Experience and expertise
   i. Relevant experience and expertise
   ii. How long your company has been in business
   iii. Similar projects undertaken and references
   iv. Experience with municipal government sector and similar services
   v. Number of installations of the version of software(s) being proposed
   vi. Description of any third party alliances/relationships

c) Product information

i. What are the key features of your solution/software?
ii. What level of integration does your solution provide?
iii. How would your solution create efficiencies?
iv. What value added features does your solution provide compared to the City's
v. current processes?
vi. What architecture does your software use?
vii. What Operating System(s) are required for the software to run?
viii. What training do you offer?
ix. What approximate timeline would be required for the implementation of your
x. solution?
xi. What after sale support do you provide?
xii. What City resources would be required for implementation?
xiii. What IT staffing do you recommend to support implementation of your system?
xiv. How many hours of project management will you provide to the City?
xv. Do you offer a "help line" for application system problems?
xvi. What is your guaranteed response time for an application "help line" call?
xvii. What hours of support are you offering? Also include the location of primary support.
xviii. Would your solution involve partners or subcontractors?
xix. Does your solution incorporate current technology features?
xx. Is your solution scalable and can other modules be added at a later?
xxi. Describe reports that would be available with your solution.
xxii. How often do you upgrade your system?
xxiii. How do you develop your system year over year? For example, user suggested improvements.

4.5 Data migration

Please complete the following information regarding data migration:

		YES/NO - explain if needed
1	Migration of present data files is required. It is expected that the conversion programs will be thoroughly tested, and that full data sets will be totally converted and loaded into the system.	
2	Programs/scripts for scrubbing data (e.g., addresses) prior to data migration.	
3	Provide information on vendor team utilized for conversion with their experience converting for similar sized organizations.	
4	List acceptable data formats.	

5	Explain the process for acceptance and remediation of issues following conversion.	
6	Describe how existing history is extracted and imported to your system at conversion.	
7	Are there fees associated with converting history?	
8	Define the historical information your system maintains and how long it is available to your customers.	

Proponents can provide any additional information which they think is relevant to the RFP or necessary to assist the City in its planning.

4.6 Implementation

Provide a detailed plan for implementing the proposed software, including but not limited to:

a) Project approach & methodology
b) Schedule of key activities, timelines, and resources
c) Project Implementation Team & qualifications
d) Description of City resources required including both estimated staff time and additional hardware required
e) Description of training strategy to City staff and time commitment, specifying how and when training will be delivered
f) Description of ongoing support and typical response time to address issues.
g) Application customization & development services.
h) Customization should only be undertaken if necessary.
i) Identify any customization and development services included in the proposal.
j) Interface creation services
k) Identify the costs and the recommend approach for custom programming, if any, that will be needed to provide interfaces between the proposed solutions
l) Testing/debugging
m) Outline testing plan that provides a comprehensive system acceptance and production testing for the proposed system.

4.7 Training

The Vendor is responsible to complete a training plan including:

a) Training strategy, including one-on-one training with critical users
b) Training methodology to ensure smooth implementation
c) Training requirements by job function
d) Training location and schedule

4.8 References

Provide examples of three recent projects, which are similar in nature and size. Preferred references would be from municipalities or other organizations with similar service provision. Particularly looking for references which have payroll & scheduling challenges in a 24/7 multi-union environment. This list will be used to provide references for the Vendor. Include details such as:

a) Scope and objectives of the project
b) Name of client organization, contact name, address, telephone numbers
c) Project duration
d) Project budgets, final costs, and schedules
e) Brief description of the project
f) Project implementation timing
g) Number of staff that assisted with the implementation of the project

4.9 Price Proposal

Please complete the following sections to provide your price proposal. The proponent shall identify the software and services required to support their work.

All prices and charges quoted for the proposed equipment and services must show applicable taxes separately and shall be expressed in Canadian currency.

Pricing can include pricing on either a hosted or in-house system or both options, if applicable.

a) List all software modules included in your proposal. Use additional sheets as required and number all the pages.

Software Solution	**Description**	**Number of licenses**	**Unit Cost**	**Initial Purchase cost***
Payroll				
Timecards				
Scheduling				
Human Resources				
Performance Development				

*Initial purchase price should include the following:

i. Total all-inclusive cost to the City for the complete project and the per diem rates for all proposed staff, including mileage costs, and any other fees that may be applicable as follows:
ii. Software costs for each application and its components which should include warranty costs associated with all elements of the proposal. The City reserves the right to select some or all of the applications as it deems necessary.
iii. Implementation/Testing Costs
iv. Third-party products cost, if applicable
v. Application customization & development services
vi. Backup & restore costs
vii. Data conversion
viii. Training costs
ix. Other costs (detailed)

b) Annual Maintenance & Support Fees

Annual maintenance and ongoing support costs must be completed. The first year of charged maintenance or license charges must be included in the "Initial purchase cost" (section 4.8 (a)). Maintenance and ongoing support or hosting – annual cost:

Software Solution	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**Year 6**
Payroll					
Timecards					
Scheduling					
Human Resources					
Performance Development					

Please indicate if software upgrades are included in annual fees.

c) Hourly Support Fee

Specify the hourly support rate for work not included within the annual maintenance & support fees.

d) Demonstrations

The City will require some proponents to make presentations in support of their proposals or to exhibit or otherwise demonstrate the information contained therein.

Demonstrations will take place during the Evaluation Period (Section 3.2), and three hours should be allowed for presentation, questions, and answers.

The demonstration must rely on current production versions of the Proponent's proposed software and related systems. It will be in the interest of the Proponent to provide sample data for their demonstration that is relevant to the subject of this RFP and to the context in which the proposed solution will operate. Evaluation of each demonstration will include the following criteria:

i. Functionality
ii. Ease of use, user friendliness, and initial user acceptance
iii. Interface design
iv. Operational performance
v. Reliability and stability
vi. Other criteria that is deemed appropriate
vii. All costs incurred by the proponent to attend this demonstration including transportation, food, lodging, etc. shall be borne entirely by the proponent

e) Additional Information

Proponents can provide any additional information which they think is relevant to the RFP or necessary to assist the City in its planning.

f) Preparation of Response

Proponents are requested to provide one (1) copy of their response.

SECTION 5 EVALUATION CRITERIA/SCORESHEET

Stage I: RFP Compliance

Proposals must be received prior to the Proposal Submission Deadline as set out in Section 3.2 of this RFP. Proposals will first be reviewed for compliance with the criteria of this RFP; any Proposal not complying with the criteria may be considered non-compliant and removed from further consideration.

Ideally one vendor could be chosen to provide this functionality; however, the City of North Battleford recognizes that software solutions from more than one vendor may be required. It is therefore open to granting awards to one or more firms as the evaluation may suggest.

Stage II: Scoring and Evaluation

After the closing date, a Selection Committee will evaluate each proposal based on the following criteria:

Criteria	Weight (%)
Company Profile	5%
Proposed Software	35%
Implementation and Training	15%
Support and Maintenance	20%
Proposal Cost	25%

Stage III: Product Demonstrations

After evaluation, Proponents receiving the highest scores will be required to provide demonstrations of their proposed solution to the Selection Committee via a virtual meeting as scheduled by the City of North Battleford.

Stage IV: Proponent Selection

The successful Proponent will be requested to enter into direct contract negotiations to finalize an agreement with the City of North Battleford for the provision of the deliverables as outlined in the Scope of Work. The term of agreement is to be for a period of five (5) years with an option to renew at the end of this term.

All Proponents are requested to provide a copy of their standard contract(s) with their proposal submission to use as a starting point for negotiations.

Based on this review, the City will determine which Proponent will be recommended to City Council for their consideration.

SECTION 6 SUBMISSION INFORMATION

Proponents are requested to provide the following information:

a) Conflict of interest statement (Appendix C)

b) Certificate of insurance (Section 2.31)

c) Proposal submission form (Appendix B)

d) Overview of the technical aspects of the proposed software solution(s) (Section 4.3)

e) Proponent overview (Section 4.4)

f) Functional requirement forms for the proposed software (Appendix D)

g) System feature forms (Appendix F)

h) Implementation, training plan and references (Section 4.5, 4.6 & 4.7)

i) Price proposal and annual maintenance & support fees (Section 4.8)

j) Proponents are encouraged to submit information even if the type of solution they might propose only satisfy part of the requirements stated in the RFP. In this case Proponents are asked to indicate how their solution may integrate with components provided by other suppliers. System suppliers who integrate with other products to provide a complete solution that meets all the requirements in this RFP are encouraged to combine their response with that of their preferred partner(s).

APPENDIX A

Instructions on How to Provide Pricing

a) Proponents should submit their pricing information as per format provided.

b) The proposal shall include a broken down to reflect the anticipated cost to complete the scope of work including disbursements.

c) Rates quoted by the proponent must be all-inclusive and must include all labour and material costs, all travel and disbursement costs, all insurance costs, all costs of delivery to the City, and all other overhead, including any fees or other charges required by law.

Terms of Payment

All invoices must be submitted to the City of North Battleford for reimbursement. All payments will be made within thirty (30) days from receipt of an approved invoice. Payments will be made upon successful completion of each milestone as per price schedule

APPENDIX B Proposal Submission Form

REQUEST FOR PROPOSAL No. FIN20240503
PROJECT: Payroll, Scheduling, Timecards and/or HRIS
CLOSING: June 6, 2024

I/WE hereby submit my/our proposal for the provision of the services as described within the request for information document for the above, named project.

I/WE have carefully examined the documents and have a clear and comprehensive knowledge of the requirements and have submitted all relevant data.

I/WE agree, if selected, to provide those goods and/or services to the City in accordance with the terms, conditions and specifications/terms of reference contained in the Proposal Document and in our submission.

I/WE agree that we are in receipt of addendum __________ to __________ inclusive, and the Proposal Price includes provisions set out in such addendum.

I/WE agree that the undersigned is/are authorized and empowered to sign and submit this proposal.

THE HIGHEST SCORING PROPONENT OR ANY PROPOSAL NOT NECESSARILY ACCEPTED AND THE CITY RESERVES THE RIGHT TO AWARD ANY PORTION THEREOF

Proponent's Legal Name ____

Street Address ____________________ City ________________ Postal Code __________

Print Name of Person Signing for Company ______________________________________

Print Title of Person Signing for Company ______________________________________

Email address ____________________ Phone No. ______________ Fax No. ______________

Signed at ______________________________this_______ day of ____________________, 2024.

Signature of Person Signing for Company ______________________________________

THIS FORM SHALL BEAR AN ORIGINAL SIGNATURE (electronic), BY AN OFFICER WITH AUTHORITY TO BIND THE COMPANY AND BE SUBMITTED TO BE A VALID OFFER

APPENDIX C Declaration of Disclosure

To: **CITY OF NORTH BATTLEFORD**

Name of Company ____

I/WE DECLARE that no person, Company, or corporation, other than the one whose proper officers is or are attached below, has any interest in this Request for Information or in the Contract.

I/WE FURTHER DECLARE that this Request for Information is in all respects fair and without collusion or fraud.

I/WE FURTHER DECLARE that no City employee, or member of Council (or their families) is, or will become, interested directly or indirectly as a contracting party or otherwise in the performance of the Contract or in the supplies, work, or business to which it relates or in any portion of the profits thereof, or of any such supplies to be used therein or any of the monies to be derived therefrom.

I/WE FURTHER DECLARE that the statements contained in the RFP are in all respect true.

I/WE hereby propose and offer to enter into the Contract on the terms and conditions and under the provisions set forth in the RFP, and to accept in full payment therefore, the sums calculated in accordance with the actual measured quantities and unit prices attached to this Proposal.

I/WE AGREE that this RFP is an offer which is to continue open for acceptance until the formal Contract is executed by the Contractor or for 90 days following the Proposal closing date, whichever occurs first, and that the City may at any time within that period, and without notice, accept this Proposal whether any other Proposals had been previously accepted or not.

Signature of Authorized Signing Officer ______________________________

Print Name of Signing Officer ____________________________________

Position ________________________

Name of Company ____

Date ___________________________

APPENDIX D Functional Requirements

Please complete and submit the following tables, as applicable to your submission.

1. Payroll System

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Process multiple independent payrolls for hourly and salaried employees on a bi-weekly, semi-monthly and monthly basis.		
2	Process multiple pay rules according to out-of-scope pay policies and in-scope collective agreements.		
3	Automatically adjust calculations for mid pay period salary and employment actions, e.g. wage increases, PT to FT, FT to casual, etc.		
4	Calculate gross pay based on hourly pay rates and annualized salary rates using variety of different pay grids and salary levels, including pay at less than 100%.		
5	Multiple types of time paid, including regular pay and leave pay.		
6	Multiple types of differential pay, including on-call, standby, and responsibility pay, but the hours are not included in "hours worked" for seniority or vacation entitlement purposes.		
7	Earnings can be identified as taxable or tax-exempt. Taxable benefits calculated.		
8	Different tax rates for various types of payments, including lump sum payments.		

9	Automatic payment of salaried employees without entry of time worked. Ability to update retroactively.		
10	Multiple overtime rules including 1.5 times and 2 times regular rates.		
11	Calculate retroactive pay adjustments from a defined effective date without re-entering hours worked. Pay statement detailing retro pay.		
12	Capable of payroll interface with time and attendance and/or time clock systems.		
13	Calculate payroll accruals for year-end salaries and benefits.		
14	Payroll deductions can be set as flat dollar amount or as a percentage of salary with minimum or maximum deduction amounts. Calculate both employer and employee portion. Payroll deductions can have maximum limits.		
15	Ability to set deduction start and end dates		
16	Security settings to restrict administrators and users to view and edit certain employee groups.		
17	Payroll advances and unpaid deductions can be tracked. Recover arrears over one or more pay periods.		
18	Reduced EI rate for full-time employees. Define annual maximum deductions for CPP, EI, etc. to avoid exceeding the maximums.		
19	Application and update of CRA withholding tables and all legislative payroll deduction changes.		
20	Ability to configure and set up new deduction types.		
21	Ability to define deduction frequency (all pay periods, first two pay periods of month, etc.).		

22	User established priority for deduction hierarchy in the event salary is insufficient to cover established deductions.		
23	User configured rules for deduction processing on special payroll runs.		
24	Unique identifier for each deduction type. Provide number of deduction codes available if not unlimited.		
25	System generated and user formatted electronic file transmissions to outside vendors to report deductions or employer paid benefits (union dues, charities, etc.).		
26	Automatic calculation of pension deduction amounts, including which earnings is part of pension contribution calculation.		
27	Automatic payroll payments via EFT to multiple banking institutions and ability to split pay to different institutions.		
28	User configuration of beginning and ending pay period dates for regular and special payroll runs.		
29	Automated stop payment of earnings when an employee is on leave without pay, inactive, etc.		
30	System generated garnishment deductions and remittances.		
31	EFT payments to third party providers.		
32	Ability to set maximum dollar amounts per employee for net pay processing with system alerts.		
33	Payroll expense journal entry, which distributes costs to multiple departments, is automatically uploaded to a financial accounting system.		

34	Ability to split earnings and related expenses, including benefits and pension, across several departments by percentage or hours worked.		
35	Calculation of seniority/service by time and hours (grid movement, vacation entitlements, pension eligibility, etc.).		
36	Automatic update of journal entries for deductions and payroll remittances including benefits to financial accounting system.		
37	Electronic filing of federal/provincial information such as CPP, EI, and income tax withholding.		
38	Issue Records of Employment within legislative timelines with upload to Service Canada.		
39	Processing of cancelled or voided payroll payments and system generation of appropriate accounting transactions.		
40	System generation of year end filing requirements (T4s, pension).		
41	Self-service options including viewing pay statements, completing TD1 forms, viewing employee banks (i.e. vacation & overtime), and submitting updated personal information.		
42	Self-service options can be accessed remotely via web or app.		
43	Generate reports on earnings, hours, benefits, and deductions by category (regular, overtime, vacation, etc.) and by full-time and part-time.		
44	Ability to configure master file for optional fields, including tracking multiple dates (hire date, seniority date, position date).		
45	Ability to scan and attach documents to master file (employment contracts, etc.).		

46	Capable of screen prints directly from the payroll system.		
47	Calculate banked time by employee including user configured rules for maximums.		
48	Calculate eligibility for statutory holiday pay, pay in lieu of benefits, etc. based on user configured rule for all employee groups.		
49	Ability to track stats worked and stat pay paid, and display stat hours on paystubs.		
50	Comprehensive audit trail for all payroll changes.		
51	Automation of short-term disability (STD) payments based on the calculation, hours and policy. Alerts when the % changes based on dates, and end of STD eligibility.		
52	Pay employees paid sick time/vacation time according to the employee's banks to avoid overpayment.		
53	Ability to make prior pay adjustments.		
54	Ability to accumulate, bank, and pay out vacation pay based on a % of earnings.		
55	Automatic calculation of earnings, deductions, vacation, and pension contributions within a pay period when employees go from PT to FT.		
56	Ability to set future dates for wage changes.		
57	Alert wage increases based on anniversary dates and part-time/casual hours.		
58	Track employee hours of work and apply/trigger payment of defined allowances when certain threshold reached (e.g., premiums, clothing allowances, etc.).		
59	Ability to show an employee with no hours on a schedule.		

60	Ability to run additional/special pays throughout the year.		
61	Allow for the building, modification, generation, and maintenance of custom reports by non-technical employees.		
62	Ability to add pay rate tables with start and end dates.		
63	Ability to preview payroll to correct errors prior to final payroll run.		
64	Multiple pay rates for employees working different positions in a pay period.		
65	Premiums / pay rate deductions for trainees, trainers, acting roles, etc.		
66	Automatically add allowances, premiums, or deductions for employees based on criteria (i.e., meal allowance, maternity leave top ups, wage garnishments)		
67	Ability to set number of pay periods in the year and have deductions calculate accordingly.		
68	Ability to calculate correct pension adjustments.		
69	Ability to track actual vs. budgeted hours by employee group and by department.		
70	Allow for scheduled reports to run automatically and be distributed to specific users/distribution lists, via email or other means of distribution.		
71	Report creation tool.		
72	Tracking and notification of allowance eligibility (i.e., boots, clothing) and payment.		
73	Explain the kinds of historical information your system maintains.		
74	What accumulators are standard? Please give examples.		
75	For archived records, what is the retrieval time?		
76	Can you set multiple retention periods?		

77	How is system performance affected by the growth of the historical records?		
78	Contains a permanent sandbox environment for training and testing of modifications.		
79	Ability to add notes.		
80	Tracks start and end dates of workers' compensation leaves, including days away from work and days of restricted work.		

2. Scheduling

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Ability to apply rules to schedule creation according to labour law and collective bargaining agreements.		
2	Pop up or alert warning if staff under 16 years old works over 16 hours per week during school weeks.		
3	Ability to copy shifts.		
4	Ability to import schedules.		
5	Manual overrides to schedules.		
6	Unlimited shift definitions. Defined by various shift start times and lengths.		
7	Supports shift premiums.		
8	Employees can set availability and handle trading of shifts with approvals.		
9	The system is visual and interactive.		
10	Schedules update in real time.		
11	Shows when over and understaffed on an hourly, daily, weekly, or bi-weekly period.		
12	Sends email reminders to employees advising them of their schedule and/or shift changes.		

13	Provides up-to-date staff availability and immediately identifies any conflicts due to overlapping shifts, overtime, and unavailability.		
14	Ability to view schedule different formats including daily, weekly, bi-weekly, and monthly in visual, list, or graphic formats.		
15	Automatically creates employee schedules.		
16	Unlimited schedules: will create different employee schedules with different settings for each work team within the organization.		
17	Multiple schedulers functionality: more than one person can manage the scheduling.		
18	Self-service access to users' own schedule.		
19	Generates schedules according to seniority.		
20	Shift replacement according to defined rules.		
21	Ability to create employee schedules with more than one shift in a 24-hour period.		
22	Ability to post & access schedules.		
23	Ability for employees to indicate their availability for work.		
24	Roll-forward scheduling (for repeat schedules).		
25	Self-serve vacation and various leave requests, i.e., family leave.		
26	Supervisor/manager approvals of time off requests with workflows into timecard and automated response to employee.		
27	Ability to schedule according to various shift types, e.g., platoon shift, recreation.		
28	Ability to send emails to employees in certain classifications to take a call-in.		
29	Ability to track call-ins.		

30	Messaging system that shows when messages have been read and the read time.		

3. Timecards (Self-Service)

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Includes the definition and application of complex pay rules based on timesheet details.		
2	Date effective recording of all timesheet and employee related data.		
3	Can maintain and modify any and all complex pay rules without vendor intervention.		
4	Allow group change capabilities to modify common elements in a group of employee timesheets.		
5	Employees can enter hours using online timesheets.		
6	Timesheet values can be adjusted by week and selected days within a week by authorized users.		
7	Provides a comprehensive audit trail of all changes made to the timekeeping records.		
8	Tracks both standard and actual hours by activity code for analysis purposes.		
9	Allow the viewing of overtime by employee(s) by time period.		
10	Includes various types of payroll lockdown dates to freeze timesheet edits for payroll processing (i.e., supervisor lockout date, hands-off date, etc.).		
11	Allow a fully reconciled payroll, labour and job activity information captured and maintained within the application.		

12	Allow the real-time alerting of immediate time and attendance value/ rule violations including; • No shows • Approaching overtime • No pay days		
13	Allow for defined deviation from schedule.		
14	Allow employees to punch in and out (create alerts/exceptions when employee clock-in/outs are different than defined schedule).		
15	Ability to create parameters (future need) for exception creation.		
16	Allow online edits to daily timesheets by employee and by authorized users.		
17	Allow real time access to activities and related costing information.		
18	Allow the validation of absence codes against associated leave balances.		
19	Allow for absence tracking with year-at-a-glance capabilities.		
20	Allow for viewing employee attendance data for a given year.		
21	Allow employees to request time off; tracks status with dynamic validation against time off rules.		
22	Allow for the employee to view their timesheet along with hours worked.		
23	Allow for the reporting of employee leave balances totals.		
24	Ability to create timesheet templates accommodating various schedules.		
25	Allow for the routing of exception report results to supervisors.		
26	Provide the ability for commenting on specific shifts and modifications.		
27	Tracking current and accrued vacation, lieu, sick, and stat time entitlements against time earned. Print on pay statements.		

28	Email alerts to be sent to management and the employee when employee vacation and in lieu time banks are above the maximums.		
29	Ability to show an employee with no hours in a pay period.		
30	Ability to assign time worked against particular pay codes (e.g., GL codes or work order numbers).		
31	Ability to assign, approve, and pay multiple shift premiums to an employee based on hours worked, schedule, and policy/CBA rules, within a pay cycle.		
32	Approval process of overtime/banked time for multiple employee groups		
33	Ability to assign equipment hours to hours worked.		
34	Maximum cap on overtime for employee groups.		
35	Banked plans can be configured for a monthly accrual.		
36	Banked plans can be configured to accrue based on length of service and user defined values.		
37	Banked plans can be configured to accrue based on user defined frequencies. • Per number of days • Per number of weeks • Per number of months • Per number of years • Per fixed date • Per included hours • Per included earnings • Per pay period • Per customer defined rules		
38	Banked plans can be configured to adhere to user defined carryover rules.		
39	Supports unlimited types of leave.		
40	Tracks the approved date when the employee's leave of absence is expected to start.		

41	Tracks the approved date when the employee is expected to return from the leave.		
42	Tracks and reports cumulative time taken (i.e. time taken under ESA).		
43	Maintains leave of absence history.		
44	Calculates the planned duration based on expected end and start dates.		
45	Employees can view banked/leave plan balances.		
46	Employees can request banked/leave.		
47	Manager can view banked/leave plan balances.		
48	Managers can view pending employee banked/leave requests.		
49	Manager can request banked/leave.		
50	Workflow approval processes are included for banked/leave requests initiated by employees or managers.		
51	Ability to have multiple leave rules.		
52	Support leave-bidding functionality.		
53	Support for blackout days and time unavailable for leave.		

4. Human Resources Information System

Describe your system's HR functionality.

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Maintain employee demographic data for all employment-related details (e.g., birth date, employee number, gender, hire date, contact information).		

2	Maintain historical data for current/former employees (e.g., names, employment, job/assignments, performance ratings, status, and pay).		
3	Maintain audit trails of employee file and data updates by date, time, and origin of update.		
4	Generate, identify, and track employees by unique employee number.		
5	Maintain education and certification data.		
6	Establish jobs/roles/positions and all relevant details.		
7	Maintain data for all job-related details (e.g., pay equity).		
8	Make simultaneous changes to large employee groups (e.g., new hires, salary changes, transfers).		
9	Enable effective/future dating of pending transactions/events, and maintain transaction history.		
10	New hire automatically routes approval based on company's hierarchy.		
11	Routes job/salary changes electronically for approval based on user defined approvals.		
12	Managers can run reports.		
13	Managers can create ad-hoc reports based on security access.		
14	Managers can view employee training and employment records including performance reviews.		
15	Progressive disciplinary actions can be tracked and reported.		
16	Email alerts can be generated based on system or user defined events.		
17	Generate seniority reports. Indicate if system can calculate seniority based on specific rules for leaves such as maternity and parental leaves.		

18	Generate employee list reports from master file information (emergency lists, active employees, pay rates by employee).		
19	Supports electronic signatures.		
20	Data/transactions submitted by managers automatically validate for accuracy and completeness.		
21	Life-to-date history on all employee fields.		
22	Retains employee status code history.		
23	Narrative history (e.g., disciplinary actions, grievances).		
24	No limit to historical data captured.		
25	Unlimited user defined fields.		
26	Identify, track, and modify employee status (e.g., full time, part time, casual, etc.).		
27	User defined reporting.		
28	Create department specific cost centers.		
29	Ability to create and maintain exceptions to defined rules (e.g. accruals; for grandfathered employees).		
30	Create, modify, and distribute various forms for employees, managers. Ability for users to initiate form, submit for approvals via defined workflows.		
31	Ability to track assets assigned to an employee (create record, modify over time).		
32	Support multiple employee types (full time, part time, casual, contract etc.).		
33	Support for multiple geographies, locations, divisions.		
34	Create, modify, and export organizational charts		
35	Trigger organizational chart updates based on new hires/employee record change.		

36	Ability to define, modify, and/or delete as required job titles, organizational structures, compensation rules.		
37	Track employee direct reports for senior leaders and managers.		
38	Maintain job requirements including licenses, certifications, and compliance related training, clearance and other requirements.		
39	“Bring-forward" or notification capability for key fields (e.g., license expiry, probationary period, etc.).		
40	Set seniority based on years, hours, dates for different employee groups.		
41	Generate vacation anniversary dates for PT employee going to FT based on previous hours worked.		
42	Ability to define grievance timelines and trigger alerts related to timelines.		
43	Ability to track grievances through stages, across business units and unions.		
44	Ability to create employee templates.		
45	Employee transfers between departments maintain prior position history.		
46	Ability to integrate with payroll system.		
47	Electronic document storage attached to employee profile.		
48	Can the termination/resignation workflow be different based on the termination/resignation reason, or other criteria?		
49	Ability to send exit interview form.		
50	Maintains exit interview information.		
51	Can automatically cancel specified employee benefits upon termination.		

52	Can providing a list of City property / resources (i.e. cellular, keys, credit cards, etc.) the employee has been issued prior to termination.		
53	Explain the kinds of historical information your system maintains.		
54	What accumulators are standard? Please give examples.		
55	For archived records, what is the retrieval time?		
56	Can you set multiple retention periods?		
57	How is system performance affected by the growth of the historical records?		

5. Performance Development

Describe your performance development feature.

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Intuitive user experience that eliminates the need for end-user training for administrators, employees, and managers.		
2	Saves work in process/draft reviews and provides option to return to complete.		
3	Maintains review dates including probationary periods with work flows sent to managers.		
4	Enables administrators to assign different review forms for different employees within the same review cycle.		
5	Enables employees to complete self-evaluations.		
6	Tracks performance review status and dates (e.g., complete, incomplete).		

7	Attach completed performance reviews to employee records.		
8	Provides email reminders and overdue notices throughout the process.		
9	Maintains performance feedback and ratings history.		
10	Provides historical reviews that can be accessed easily by managers or administrators.		
11	Enables administrators to view the status of the review process at any time.		
12	Provides delivery of standard competencies and objectives.		
13	Provides goals management that allows either the employee or manager to create and add their own personal goals or objectives.		
14	Enables individual weighting of goals.		
15	Provides ability to assign employee performance objectives that align with your department's overall business strategy.		
16	Provides access to all talent factors, including employee information, review history, skills and competencies, education, salary history, and learning history, based on role.		
17	Enables reporting and analysis of performance ratings for various employee groups (e.g., by job, manager, geography).		
18	Provides a centralized gateway for managers to monitor the progress of their performance management activities — in one place.		
19	Summarizes performance review in an easy-to-read format that can be printed for future reference.		

20	Integrates with career development and succession management applications and processes (e.g., learning plans/career planning).		
21	Can generate performance improvement plans and tracking.		

APPENDIX E Optional Software

Please complete and submit the following tables, as applicable to your submission.

1. Onboarding

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Allows employer to send onboarding documentation required to new hires for completion and provides the new hire ability to submit their completed onboarding documentation to the employer via the onboarding module.		
2	Ability to monitor the overall status of the onboarding process, providing a clear indication of "new hire readiness."		
3	Ability to provide response and status via electronic messaging.		
4	Digital signature capability.		
5	Ability for Payroll/HR to enter all required data on behalf of the contingent worker.		
6	Ability to prepopulate form fields using data provided by unified recruitment.		
7	Ability to automatically notify other areas of organization of new hire (IT, payroll, etc.).		
8	Ability to facilitate automation of new hire paperwork collection and new hire responses.		
9	Ability to link to person prior to bringing on board to enable new hire process to begin earlier.		
10	Ability for HR and manager to create/access new hire/rehire checklist, by position, with check-off ability as tasks are completed (e.g., offer letter has been sent and received).		

11	Ability to automatically notify new hire of activities he/she needs to complete and then send reminder if he/she does not complete these in a timely manner.		
12	Ability to enter new hire before start date (effective dating) and new person will not appear on org charts until effective start date.		
13	New hire data is automatically routed to payroll, benefits, and other applicable areas.		
14	Ability to generate acceptance email notice/workflow notification to hiring manager, with start date.		
15	Ability to include range of documents, such as letter of offer, TD1, etc.		
16	Ability to deliver employment eligibility verification, with automatic status update and validation noted in employee profile.		
17	Ability to print a new hire package for candidate's signature as well as workflow to generate appropriate pre-employment forms to be sent to the candidate.		
18	Onboarding process for internal and external employees. Triggers specific training for internal movement when moving into a management position.		
19	Training notification/workflow for new hires.		
20	Increments posting numbers automatically or entered manually.		
21	Integrates with other screening tools including written assignments or assessments.		
22	Generates offer letters containing all compensation options to applicant/candidate after approval.		

23	Job openings will track the posting number, status, and reason for the opening.		
24	Job openings will include employment information including salary range and employment type, i.e., full/part time, casual, etc., indicator.		
25	Job opening will include education and skill requirements.		
26	Assist in the creation of and house job descriptions.		
27	Job opening will include location information.		
28	Generates reports on all fields that exist in the database.		

2. Hiring

Describe your employer configurable new hire workflow

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Provides ability to automatically notify other areas of organization of new hire (IT, payroll, etc.).		
2	Provides ability to automatically notify new hire of activities they need to complete and remind them if they don't do them in a timely manner.		
3	Manager is prompted to assign correct property/equipment/resources to the employee.		
4	Ability to enter new hire before start date (effective dating) and new person will not appear until effective start date.		

3. Benefits

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Provides total integration between benefits and payroll including other payroll vendors.		
2	Assigns different benefit packages to different groups of employees based on eligibility rules.		
3	Establishes benefit/deduction plans with multiple types and options.		
4	Updates benefit/deduction plans based on employee status change.		
5	Tracks “waived” benefit/deduction plans.		
6	Assigns a rate schedule to apply new rates with future effective dates for the new plan year.		
7	Without writing a separate program, automatically updates premiums for age/salary driven benefit calculations.		
8	Automatically enrolls employees in required plans.		
9	Automatically cancels specified employee benefits upon termination.		
10	Allows benefit costs to be set up for the new year while continuing processing for the current year.		
11	Tracks and maintains information for dependents and beneficiaries.		
12	Tracks and reports workers’ compensation claims, costs, tracking of lost time, restrictions, legal reporting requirements.		
13	Facilitates reporting to third-party vendors such as benefit providers.		

14	Provides one screen that shows employee data (“benefits at-a-glance”) without having to scroll through multiple screens.		
15	Ability to provide summarized benefits statement to individual employee via self-service.		
16	Defines and maintains benefit/deductions for the employee and employer.		
17	Includes automated schedules for benefits/deductions.		
18	Supports benefit/deduction goals and limits.		
19	Supports “catch up” contributions on deferred compensation plans.		
20	Recovers benefit/deduction amounts that have been put into arrears.		
21	Supports multiple arrear types.		
22	Includes defined start and stop dates for benefit/deduction.		
23	Processes one-time benefit/deductions.		
24	Includes pre-tax and post-tax benefits/deductions.		
25	Supports a designated default amount for each deduction code.		
26	Supports multiple types of life insurance, long term disability, and short-term disability.		
27	Employee self service functions. Module includes automated signatures.		
28	Benefits reconciliation between systems generated costs and invoice from benefit carrier.		
29	Email notifications to the Benefit Administrator about upcoming changes.		
30	Audit trail for tracking changes. Allows for note taking, i.e., benefits suspended for 1 month during approved unpaid leave, etc.		

4. Leave Administration

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Supports tracking of multiple types of leaves and identifies type of leave, i.e., short-term disability, long term disability, maternity and/or parental leaves, ESA leaves, WCB, etc.		
2	Tracks due dates from physician and retains assessment forms.		
3	Supports maximum duration of leave types.		
4	Tracks the approved date when the employee leave of absence is expected to start.		
5	Tracks the approved date when the employee is expected to return from the leave.		
6	Tracks and reports cumulative leave time taken.		
7	Maintains leave of absence history.		
8	Calculates the planned duration, based on expected start and end dates.		
9	Supports workflow approval processes for leave requests initiated by employees or managers.		
10	Displays warning message during pay processing if time entered exceeds the leave balance.		
11	Can trigger invoicing/payments for employee on an unpaid leave/LTD for benefits.		

5. Applicant Tracking System (ATS)

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Includes an employment requisition form for hiring managers to complete, including standardized questions, i.e., is this a replacement, new position, is the position budgeted for the current year, etc. Has approval workflows, once approvals obtained, flow back to HR to initiate job postings. Ability to attach documents, e.g., current job description.		
2	Ability to post internal and external jobs to city's internet site. Has a requisition library of job templates that can be utilized when creating job postings.		
3	Tracks expenses by applicant/candidate level and associates them with a specific requisition or a general recruiting activity.		
4	Allows applicants to apply online with ease. Sends automatic responses, notifications, or emails to applicants/candidates. Notifies applicant that application has been received.		
5	Allows administrative support to customize verbiage on the email messages (including confirmation acknowledgement and job filled) to external and internal applicants/candidates.		
6	Allows users to email potential interview times, applications, corporate material, job opening status.		
7	Provides a library of standard communication correspondence for printing and distribution.		

8	Integrates seamlessly with standard email systems (MS Outlook) for applicant/candidate activity for hiring managers and recruiters.		
9	Allows administrative support to schedule interviews, notify interviewers of times, locations, and topics to cover.		
10	Distinguishes applicant/candidate status for internal or external candidates.		
11	Associates applications and resumes to a specific requisition without having to change screens/databases.		
12	Has history that consists of one candidate record with all the associated recruiting activity regardless of the number of postings.		
13	Maintains resumes/applications in the system.		
14	Ability to search resumes/applications using key words.		
15	Stores resumes for future use by category, job title, skill, or other user-defined attributes.		
16	Allows applicants/candidates to modify or replace their existing resume.		
17	Ability to flag applicants and/or names and make comments/notes.		
18	Houses interview question templates for each job.		
19	Hiring managers and HR can review prescreened applicant/candidate.		
20	Hiring managers/recruiters can track applicant/candidate status.		
21	HR can schedule interviews.		
22	HR can communicate with applicants/candidates via electronic messaging.		

23	HR can view communication history.		
24	HR can report on communications.		
25	Hiring managers and recruiters can view and print assessments between applicants/candidates.		
26	HR can record interview notes.		
27	HR can view and print applicant/candidate job history, qualifications, and resume.		
28	HR can enter additional applicant/candidate information.		
29	Searches applicants/candidates based on a variety of criteria (e.g., location, skills, prior employers, postal code).		
30	Embedded workflow for approvals based on defined process including job posting approval, offer approval, and new hire approval.		
31	Allows users to attach documents to an applicant/candidate record.		
32	Provides web based data collection.		

APPENDIX F System Features

Please complete and submit the following tables, as applicable to your submission.

1. Remote Access

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Internal access for employees in City facilities.		
2	Remote access for employees at home.		
3	Mobile capabilities for small screens.		
4	Demonstrate consideration for accessibility needs.		

2. Security

Please note: the code is either M-Meets, D-Does Not Meet, or P- Partially Meets

	Requirements	Code	Comments
1	Provide the ability to export all City data.		
2	Single sign-on capabilities with active directory.		
3	Adhere to privacy guidelines defined by the privacy commissioner and MFIPPA.		
4	Full security audit trails for user activities, i.e., user, time, transaction detail, contents before and after transaction.		
5	Encryption of City data.		
6	Strategy to export and retain full backups of City data.		
7	Restoration/recovery options and strategy.		
8	Demonstrate data portability at the end of service term.		
9	Passwords have complexity and expiration rules and enforcement.		

10	Passwords are not readable by anyone – not even system administrators. New passwords are assigned when passwords are forgotten.		