

REQUEST FOR PROPOSAL

PAYROLL SERVICES

AUGUST 21, 2015



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1. SUMMARY

The California Workforce Association (CWA) is accepting proposals to offer capacity building to the workforce development system in California. The purpose of this RFP is to provide a fair evaluation for all candidates in order to establish a payroll services vendor that can be accessed by California's workforce development system.

2. PROPOSAL GUIDELINES AND REQUIREMENTS

This is an open and competitive process.

Proposals received after 5:00pm PST, Thursday, August 27th, 2015, will not be considered.

The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal.

Provisions of this RFP and the contents of the successful responses are considered available for inclusion in final contractual obligations.

This RFP does not commit the California Workforce Association, its members, local workforce boards or any other party to award a contract and may be withdrawn, amended or modified at any time in the sole discretion of the CWA. CWA will not pay any costs incurred in the preparation, submission or consideration of a Proposal to this RFP, or any other costs or any type of kind incurred prior to the effective date of a contract awarded by CWA.

3. CONTRACT TERMS

Individual contract terms will be negotiated separately upon selection by one of CWA members. All contracts are subject to review by CWA legal counsel, and a project will be awarded upon signing of an agreement or contract, which outlines terms, scope, budget and other necessary items.

4. OBJECTIVE

Objective

Our primary objective is to offer fully-procured payroll services that can be offered as a member benefit.

5. TIMELINE

- This RFP is dated August 21, 2015.
- Proposals are due no later than 5:00pm PST, Thursday, August 27, 2015.
- Proposals will be evaluated immediately thereafter. During this time we may require interviews with our evaluation team. You will be notified if this is requested.
- The name of the candidate firms who have been selected will be decided on or about September 1, 2015.
- Work described in this RFP will extend for a period to be determined in the contract, with both parties reserving individual rights to extend the contract at the conclusion of that period, and in perpetuity based on the terms that will be issued in the contract of services.

6. BUDGET

Applicants must present full pricing for services offered, including a 10% fee to CWA to compensate for the procurement, as well as marketing and evaluation of services offered.

7. BACKGROUND OF ORGANIZATION

Our Mission

CWA has in its membership the 49 Workforce Investment Boards in the state of California, whose Directors serve as our Board, along with a WIB Member representative. We also have affiliate members, which include Chambers of Commerce, post-secondary and K-12 education organizations, community based organizations, private training providers, and other workforce development stakeholders.

7a. Brief Background on Organization

The California Workforce CWA is the premier organization for providing capacity building, leveraging partnerships, and facilitating dialogue to strengthen the Local Workforce System in the state.

Local Workforce Systems are where industry connects with workforce to promote economic development and gainful employment for all.

Our vision for California's Local Workforce System consists of the following:

- Promote Regional Work, focusing on Demand Sectors to promote Regional Economic Development
- Increase usage of Earn and Learn Models, such as Apprenticeship, WEX, and OJT
- Develop Skills and Credentials of Incumbent Workers to help increase Income Mobility
- Develop Career Pathways starting with K-12 and through a person's work life
- Share Common Benchmarks across Stakeholder groups to produce greater Outcomes and enhance Partnerships.

8. STAFF RESOURCES

CWA's core team for the Payroll Services project includes:

Project Lead: Responsible for sign-off on key decisions, providing project steering and maintaining relationships with outside stakeholders (CWA Staff Leadership Team, Board Members) – Bob Lanter, CWA

Project Manager: Responsible for maintaining the marketing and procurement of the payroll service program. Maintains communication between other team members – Michael McNulty, CWA

9. SCOPE & GUIDELINES

Professional services will include, but are not limited to, the following:

Payroll Services Provided:

Contractor shall serve as the employer of record and offer all payroll services accordingly. Contractor shall notify CWA of any use of sub-contractors.

Contract Logistics:

Following CWA contacting the organization/contractor and the CWA member seeking payroll services, the organization/contractor will work directly with said member on specific logistics and contract requirements. Any contractual requirements should be included in response to the RFP, to be listed on the CWA website.

10. QUALIFICATIONS

The ideal Organization/Consultant will:

- Have at least five (5) years of direct experience providing payroll services; including experience working within the workforce development system.
- Have no professional and/or ethical conflict with CWA's interests;
- Have a demonstrated and verifiable track-record;
- Have independently verifiable references of work;
- Be fully dedicated to the goals and objectives the local workforce development system.

11. FORMAT FOR PROPOSALS

All proposals must provide specific and succinct answers to all questions and requests for information. Indirect, imprecise, or incomplete responses can serve only to the disadvantage of the proposer. Please answer the questions in the format and order presented. (Submissions of individual resumes alone will not be considered responsive to any specific question).

Title Page:

CWA, Payroll Services Proposal, your company name, address, web site address, telephone number, fax number, e-mail address and primary contact person.

Cover Letter:

Signed by the person or persons authorized to sign on behalf of the company (1-2 pages).

Organizational Overview and Experience

- a) Organizational Overview – please describe your organization including mission.
- b) List your payroll services offerings that are applicable to this RFP.
- c) Define the standard time frames for response to an inquiry from CWA staff upon a contract request from an interested party.
- d) Describe the preferred method for transmittal of requests and other material from CWA.
- e) Describe in detail the efforts you will undertake to achieve client satisfaction and to satisfy the requirements of the Scope of Services section.
- f) Please list all clients for which you or your firm previously provided payroll services for over the last two years.

Budget:

- a) Please submit a budget for offering payroll services to CWA members, including CWA's 10% fee for services
- b) If travel expenses are excluded in the budget, please specify.

Submission:

An emailed copy of your proposal must be received no later than 5:00pm PST, Thursday, August 27, 2015. Your proposal must include a cost proposal as described above.

Deliver proposals to:

Michael McNulty

rfp@calworkforce.org

Subject Line: Response to RFP on Payroll Services

Michael McNulty, Program Manager for the California Workforce Association, is managing the RFP process for payroll services. All communications on this proposal, including final selection, contract award, all reports and communications shall go directly through the assigned CWA staff person unless otherwise stated or requested.

Michael McNulty
1107 9th Street, Suite 801
Sacramento, CA 95841
(916) 325-1610
rfp@calworkforce.org

Appeals:

All appeals must be submitted in writing to Bob Lanter, 1107 9th St, Suite 801, Sacramento, CA 95841. If necessary, a second appeal can be submitted in writing to CWA Board of Directors at the same address as above.

12. EVALUATION CRITERIA

Projects will be scored individually as outlined below.

RFP COMPONENT	Points
SECTION I – COVER PAGE	5
SECTION II – ORGANIZATIONAL OVERVIEW/EXPERIENCE	40
SECTION III – BUDGET	30
TOTAL	75

Following release of this RFP through the completion of the evaluation process, Respondents should not contact CWA members or CWA staff charged with oversight of this project to avoid conflicts of interest, appearance of conflicts of interest, or undue influence over the process. Comments, questions or clarifications regarding this RFP will be handled through the CWA Program Manager assigned below:

Michael McNulty
1107 9th Street, Suite 801
Sacramento, CA 95841
(916) 325-1610
rfp@calworkforce.org

During the evaluation process, CWA reserves the right, where it may serve CWA’s best interest, to request additional information or clarification from proposing firms, or to allow corrections of errors or omissions. In addition, qualifications and references of the top firms will be verified. Personal interviews of the top candidates may be conducted

It is understood and accepted by Respondent that all decisions and the degree to which a Proposal meets the evaluation criteria and the overall needs of the Association and its members are within the purview and judgment of CWA staff and its Board of Directors. A review panel will evaluate all RFPs.

Selected Respondents may be invited to participate in oral presentations and/or interviews as deemed necessary by the Proposal evaluation panel. All Respondents are advised to be prepared for a presentation and/or interview on short notice. Oral presentations/interviews will be based on Respondents’ Proposal and shall not include any new information or presentation not included in the Proposal. The individual that will be directly responsible for carrying out the contract, if awarded, should be present at the oral interview.

A representative of CWA will negotiate the terms and conditions of a contract with the selected firm upon being chosen as a service provider by a CWA member organization. The contract will require that the firm maintain general liability, professional liability, automobile, and workers' compensation (if necessary). The contract will also contain certain provisions requiring the selected firm to indemnify CWA. Provisions will also be included in the contract allowing CWA or the member inquiring for the service to terminate the agreement, at its sole discretion, upon the provision of notice.