Digital Directions

HR & Payroll Selection

Request for Proposal

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3.1 Geographical Scope

Offices in the following countries are in scope:

- -
- -
- -

3.2 Functional Scope

The functional scope of the project encompasses the core HR functions of:

- -
- -
- -

3.3 Employee and User Estimates

Employee and freelance numbers by business are summarised in the table below.

Company	**Total Employees**	**Total Subcontractors**

Grand Totals		

4 RFP Response Instructions

4.1 Overview of the Selection Process

ACTIVITY	DATE
Deadline for Receipt of RFP responses (softcopy)	
Gate 1 Workshop: Review of RFP responses & shortlist three vendors for demos	
Vendor Demo Preparation Calls	
Reference Calls	
Vendor Demos	
Gate 2 Workshop: Demo Review & select preferred vendor	
Contract Review and Commercial Negotiation	
Sign Contract	

4.2 Decision Criteria

The following decision criteria will be used to evaluate vendor proposals (the order in which the criteria are listed is not an indicator of importance):

- -
- -
- -

4.3 RFP Documentation Set

4.3.1 Overview

The full RFP documentation set includes the following:

- -
- -

4.3.2 RFP Document

- Sections 5 to 8
    - HR and Payroll requirements
    - Implementation and support

    - Requests for ancillary information on the vendor and software proposed
    - Requests for information regarding reference sites
- Section 9 – Costs
    - This section requests information regarding costs. It is important that the Excel template provided is used. Other backup cost material in proprietary formats may also be included, as long as the templates are also completed.

4.4 Instructions for Responding to the Requirements

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Name	
Email contact	
Mobile phone	

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w

5 Key HR Requirements

5.1 General

5.1.1

Profiles set at the user level should allow for date formats and language to be specific to that individual.

Please confirm this is the case.

5.1.2

It is important that roles and associated security permissions can be applied so that access to HR and Payroll records can be controlled. This should allow HR/Payroll users with appropriate permissions to view records across the organisation, while limiting other users to records specific to a given entity.

Please confirm that this is supported.

We require integration to G-Suite / Microsoft business applications.

Please confirm that the proposed solution would be able to integrate to G-suite / Microsoft applications.

5.1.3

Each entity may require its own workflow approvals. These should be able to be managed by (super)users from within the business.

Please describe how workflows can be set-up and managed within the system by users.

5.1.4

We require the ability to utilise its own collateral (e.g.., company logo, documents with the appropriate tone of voice etc.) within the HR processes.

Please explain how this would be best achieved within the solution proposed.

5.1.5

We may, from time to time, need to communicate urgent information to all staff via text message and/or email, for example in the case of temporary site closures due to extreme weather events.

Please clarify whether the system provides any functionality that would support this requirement, by allowing mass communications to be issued to all staff in a division or site.

5.2 Recruitment

5.2.1

We currently uses __ for applicant tracking and recruitment, please confirm that your solution could be integrated with both of these applications, highlighting any examples from existing clients where this has been done.

5.2.2

We require functionality to support standard recruitment activities, including:

- allowing managers to specify vacancies and submit recruitment requests for internal review and approval.
- preparation of job advertisements and publication both internally and to external agencies, sites and services such as LinkedIn.
- receiving and managing job applications.
- confirmation and capture of the “right to work” during the application process.
- coordinating and communicating with candidates throughout the shortlisting and selection process (scheduling of interviews, issue of offer and rejection letters, exchange of contract documents etc.).
- management of background checks as appropriate for specific functional areas e.g.., finance.
- management of the taking up of references once an offer has been made.
- confirmation of proof of address; and
- tracking and reporting on the overall status of recruitment requests and activities.

If your proposed solution included a recruitment module, please describe how it supports the end-to-end recruitment process, taking care to cover each of the points above.

5.2.3

A repository of standard job descriptions should be held within the system. These should be augmented by other necessary internal documentation e.g.., IT new starter form for provisioning of equipment.

5.2.4

The system should allow for a repository of candidates to be created. This should include functionality to support speculative submissions.

5.2.5

In conjunction with 5.2.4, the system should highlight if a duplicate candidate is being created.

5.2.6

Please describe any functionality within the system to anonymise CVs.

5.2.7

Please explain where submitted CVs are stored within the system, and how secure access is provided to recruiting managers.

5.2.8

The system should allow the creation of a workflow which ensures final approval of a candidate prior to an offer being sent out.

5.2.9

The system should allow for both manager and employee to sign offer letter and contract electronically.

5.3 Employee On-Boarding

5.3.1

When a job offer has been made, a link to a form is sent to the successful applicant which allows the upload of identification documentation (e.g.., passport) and tax documentation. The completed form requires an electronic signature.

Please confirm that this is supported.

In some cases we ask for successful candidates to visit the office the week before their start date to bring appropriate documentation to HR e.g.., passport.

Please describe how this process would be supported by the system.

5.3.2

A candidate portal would be strongly favoured. This would be required to provide, amongst others:

- The ability for the successful candidate to upload a photo of themselves.
- The ability for the successful candidate to populate personal details (e.g.., next of kin, bank details)
- The status of documentation requested.
- Links to relevant company policies.

- The opportunity to sign an NDA; and
- The opportunity to employees read and sign relevant company policies prior to joining the business.

Please explain if such a portal is possible and, if so, provide details taking care to cover each of the points above.

5.3.3

When a job offer has been accepted and the start details of the new joiner have been confirmed, an employee HR record needs to be created in the system and details passed to various teams and other systems for action. This may include some or all of the following:

- IT user accounts setup.
- setup of Time & Attendance and payroll records.
- security pass setup for site access.
- hardware provisioning (laptop, phone etc). Note that this could be enabled via an IT starter form associated with the job description) and printer setup.
- access to the benefits platform from the scheduled start date.
- scheduling of induction and training; and
- scheduling a welcome message from the line manager to the new employee.

Please describe how actions such as those listed above would be triggered by the system and the level of automation that could be achieved.

5.3.4

We require that all new employees read and sign company policies within fourteen days of joining the business.

Please describe how this would be enabled and tracked within the system.

5.3.5

The system should automatically schedule probation appraisals and flag these to the relevant managers when due or overdue.

5.3.6

Once probation is passed or probation extension has been extended, a confirmatory letter needs to be sent to the employee.

Please describe how this could be best enabled from within the system.

5.3.7

New employees become eligible to enrol in the company pension scheme when they have been employed for a specified period. The system should accommodate the scheduling of employee notifications to indicate that the eligibility criteria for pension enrolment have been met.

5.4 Maintaining Employee Details

5.4.1

System workflow should be available for electronic submission and authorisation of requests by managers to change an employee's job title, department, reporting line, working hours, pay or conditions.

Please indicate whether there is a standard workflow for approval of changes to employee records, or whether this would need to be configured from scratch.

5.4.2

A letter must be sent to the employee when there is a change to an employee's job title, department, reporting line, working hours, pay or conditions.

Please describe how this could be best enabled from within the system.

The system should allow us to be able to specify which HR fields are eligible for employees to update via self-service without approval and those that will require approval.

5.4.3

The system should provide a warning to employees when changing of bank details with a specific deadline to make sure that payroll has enough time to successfully implement any changes requested.

5.4.4

The system should allow HR records to be created for freelancers and provide for categorisation fields to capture for example, whether they are a Sole Trader or Limited Company, whether they are paid via payroll or accounts payable.

5.4.5

It is important that the system can store IR35 status determination outcomes and documentation against freelancer HR records.

5.5 Leave Management

5.5.1

In some cases we have company shutdown (e.g.., between Christmas and New Year). Others do not.

Please describe how leave calendars for each entity can be maintained.

5.5.2

The system should calculate the leave entitlement for each employee.

5.5.3

The system should calculate maternity leave dates.

The system should allow employees to make a self-service request for leave. Ideally, the system should show leave bookings for relevant team members so that the employee can judge whether the request is likely to be accepted.

5.5.4

The system should allow employees to make a self-service request for events other than personal leave e.g.., working from home, doctor's appointments, training, charity days etc.

5.5.5

Please describe the workflow used by managers to approve leave. This should also cover the delegation of responsibility should a manager be out of the office.

5.5.6

Please confirm that workflow approvals can be reviewed and applied on both desktop and mobile devices.

Some employees to carry holiday over to the next year to a prescribed maximum number of days.

Please describe how this would be controlled within the system.

5.5.7

We have a scheme which allows some employees to purchase additional holidays as part of their benefits package.

Please outline how this could be supported.

5.6 Absence Management

5.6.1

On occasion, employees may find themselves working hours additional to their contract of employment e.g.., to deliver a project against a client deadline. We need to accommodate "days off in lieu" so that accurate HR records are kept.

Please describe how this would be enabled within the system, including any workflow necessary for the manager to grant approval for this leave to be taken

Absence through ill health for an employee could be entered onto the system by line managers, administrators or Personal Assistants.

Please explain how the ability to record absence due to ill health can be determined by user role.

5.6.2

We would like the system to flag when an employee is approaching the end of their paid sick days.

Please explain how this could be achieved.

5.6.3

Please explain how the system supports "Return to Work" interviews, including provision of pertinent reports to managers e.g.., number of absences in a fixed time period.

5.6.4

Please provide an overview of the system functionality pertaining to absence due to maternity, paternity, shared parental and unpaid parental leave.

5.7 Timesheets

We have some freelancers are paid via payroll. They submit a timesheet each month detailing the hours they have worked during the period. It is likely that the timesheet solution used for this in future will be part of the planned ERP system.

5.7.1

As described above, it is likely that the timesheet functionality employed by us will be part of the solution. However, if the proposed HR solution offers timesheet functionality, please provide a brief overview of this.

5.7.2

If a timesheet solution is available, please confirm that this allows employees to access timesheets on mobile devices.

5.7.3

If a timesheet solution is available, please confirm that the system allows managers to approve timesheets for employees and/or freelancers.

5.7.4

Ideally, holidays and other absences that have been recorded in the HR system should automatically populate the timesheet solution that is used. Please describe how this could be achieved.

5.8 Performance Management

5.8.1

We require a user-friendly system to support its annual (can also be periodic, depending upon entity) performance management cycle. This should include:

- scheduling and reminders for staff and managers to hold periodic performance conversations.
- scheduling, tracking and documentation of formal annual performance appraisals, including the capture of appraisal notes, ratings and outcomes.
- customisable so that a different set of questions are seen by the employee and the manager.
- can reflect the matrix management that exists (e.g.., in project activity, the line-manager may not have directly overseen the work that has taken place and so input from a project manager may be more appropriate); and
- the ability for the leadership team to oversee and report on performance management activities, to ensure these are completed in a timely,

consistent and fair manner for all employees.

Please provide a brief overview of the standard functionality provided by the system to support employee performance management, taking the above points into consideration.

5.8.2

Please confirm that it is possible to configure different performance management processes for different departments/entities.

5.8.3

The system should allow managers to request 360-degree feedback as part of their career review cycle.

5.8.4

Please describe how the system's performance management features tie in with any wider talent management and succession planning capabilities of the system.

5.8.5

The system should support integration with learning management training platforms. If standard integrations are available with any specialist learning management systems, please provide details.

5.8.6

Please provide an overview of how the system can help to support mentoring within the organisation.

Please indicate if it is possible to create links to Continuous Professional Development logs (e.g.., Institute of Practitioners in Advertising) from the system.

5.9 HR Case Management

5.9.1

The system should support management of employee-related cases such as grievances, investigations and disciplinary issues. This should include case initiation, prompting managers for relevant information, the capture of case details and related documents, scheduling of meetings and events (e.g.., disciplinary hearings), generation and issuing of related correspondence (e.g.., invitations and outcome letters), and reporting on the volumes, types and statuses of cases in the system.

Please provide a brief overview of the case management functionality provided by the system.

5.10 End of Employment

5.10.1

We require functionality to support standard end of employment activities, including:

- scheduling of an exit interview (face-to-face and/or the submission of a form).
- an automated e-mail reminding the employee to download their payslips, P60 etc and reminding them that access will end once they have left the organisation.
- the return of any IT equipment that has been issued.
- the return of company credit cards.
- cancellation of any outstanding benefits e.g.., private medical insurance; and
- reporting the status of tasks as detailed above to relevant stakeholders.

Please describe how the system supports the end-to-end leavers process, taking care to cover each of the points above.

5.10.2

Employees need to be formally notified when their employment is ending, whether this is confirmation of contract-end, resignation or redundancy, notice of dismissal, or any other applicable scenario. The system should support configuration and generation of standard termination letters for each scenario.

5.10.3

Sometimes notifications will be generated outside of the system. It should be possible to easily upload externally generated end-of-employment documentation to the employee record.

5.10.4

The system should support the capture of an employee serving notice to terminate their employment whilst noting that their last day in the office may be different from the last day of their notice period.

5.10.5

GDPR (or the equivalent legislation for countries outside of the EU) requires that some HR records are removed from the system within a certain fixed amount of time of an employee leaving the organisation.

The system should provide notification when records are to be deleted based on the legislation per country.

5.11 Self-Service Portals

5.11.1

Employees should be able to access a dashboard or homepage that presents them with relevant HR actions and information for their role. This should include:

- options to view and update personal details, including adding a photo.
- access to their job specification and employment terms and conditions.
- links to current employment handbook, policies and procedures.
- leave entitlements, booking and balances.
- link to payroll provider portal/website for access to electronic payslips.
- access to performance management and appraisal information.

Please confirm that all the above features are available as standard in an employee self-service portal.

Managers should be able to access a dashboard or homepage that summarises all relevant information, requests and activities requiring their action. Examples of information that should be presented to managers include:

- recruitment status for advertised vacancies.
- new employee start-dates and induction appointments.
- employee leave dates and requests for leave approval (see also section 5.5)
- reports and statistics on planned and unplanned absences (e.g., sickness).
- probation and performance appraisals to be scheduled and carried out.

Please confirm that managers would be able to access the above information easily within the system and indicate how they would be notified or alerted to actions requiring their attention.

5.12 HR Reports

5.12.1

Please provide an overview of standard reporting that is available within the proposed HR solution. Please detail any statutory reports (e.g.., Gender Pay Gap) which are present.

5.12.2

The system should support the generation of organisational charts and reports by entity and country, including employee information such as headcount, establishment (budgeted vs. actual headcount), leave statistics, salary figures, gender and diversity trends, etc.

5.12.3

Please describe any dashboarding functionality that exists within the solution to provide managers with HR Key Performance Indicator information, including drill-down to underlying data.

5.12.4

Please provide an overview of how user-defined reports could be created within the proposed HR solution.

5.12.5

Please confirm if the system provides Employee Liability Information reporting to support outgoing employer obligations as set out in the TUPE Regulations.

5.13 Mobile Access

5.13.1

Please confirm that all system functionality available on a desktop client is also available on mobile clients, or if this is not the case, highlight what is not available on mobile.

5.13.2

Please provide an overview of any mobile apps that are available as part of the solution.

5.14 Document Storage

5.14.1

There should be a repository for documents against each employee record. The access to each repository should be secured so that only the line manager, appropriate HR staff and individual can see it.

5.14.2

Please provide an overview of how a document audit trail (including evidence of communication) would be maintained within the system.

6 Key Payroll Requirements

6.1 Compliance

The table below lists the countries where we currently operate and where statutory accounts are filed.

Country	Payroll Available (Y/N)

6.1.1

Please indicate the countries for which a payroll solution is available by completing the table above.

6.1.2

For markets where the payroll solution isn't available, please confirm that the software supports the transfer of approved time and expense transactions to a third-party payroll system.

6.1.3

Explain how software updates relating to legislative changes are deployed.

6.2 Security

6.2.1

Please provide a high-level overview of the security features of your payroll system. This should include an overview of the audit trail of any changes that have been made to master data.

6.2.2

Describe the features provided by your system to control the approval of the completed payroll before a file is created for electronic funds transfer or online banking.

6.3 General Payroll Requirements

6.3.1

Please confirm that the payroll solution can for process BACS payments.

6.3.2

Following approval of changes to payroll-relevant employee data within the HR solution, workflow should create a pending change to payroll. Following review, the change will be approved and become active.

Please confirm that such a workflow is possible and describe how the review would take place within the payroll function.

6.3.3

The payroll solution needs to integrate with selections made (e.g., private medical) by the employee on the Fair Care Benefits Platform.

Please confirm that your payroll solution could integrate to the Benefits Platform to capture this data.

6.3.4

Several changes relevant to payroll originate in the HR solution via a form which the employee accesses through the Fair Care Benefits Platform (season ticket loans, gym membership, cycle scheme, etc).

Once approved via the Fair Care Benefits Platform, these need to flow through into both HR and payroll.

Please explain how you think this data flow would work best i.e., the benefits platform updates the HR solution, which then updates payroll, or the benefits platform updates both HR & payroll.

6.3.5

Any changes to employee master data made within payroll (e.g., National Insurance details) should feed back into the HR solution.

Please confirm that this happens automatically.

6.3.6

Once an employee gives details of maternity/shared parental leave, these details are entered into the HR solution. These details should flow through automatically to the payroll solution.

Please confirm that this happens automatically.

6.3.7

Once an employee gives details of Keeping in Touch days, these details are entered into the HR solution. These details should flow through automatically to the payroll solution.

Please confirm that this happens automatically.

6.3.8

Please confirm that unpaid leave days flow through automatically from the HR solution to the payroll solution.

6.3.9

Payslips, P60s and P11D forms should be accessible from the HR employee self-service portal.

Please confirm that the payroll solution can make these documents available to the HR solution.

6.3.10

Please confirm that the payroll system supports emailing of documents such as payslips, P60s, etc. to employees directly from the system.

6.3.11

Upon notification of an employee leaving, Payroll need to be notified so that a review can take place of salary, holiday accrual, benefits outstanding so that balancing payments can be made.
Please describe the process used in the payroll system for determining leaver salary, holiday accrual and benefits outstanding.

6.3.12

On-screen enquiries for “calculating net pay if gross pay was £xx, what would the net pay be if I joined the bike scheme?” should be supported within the payroll solution.

Please explain how “what-if” questions of this nature would be resolved by a user of the payroll software.

6.4 Freelancers

For the purposes of this document, freelancers are defined to be contract resources rather than employees.

6.4.1

The payroll system will need to import freelancer timesheets, which specify the number of days that each freelancer should be paid in a given payment run.

Please confirm timesheet records can be imported into the payroll solution and used to determine freelancer pay per period.

6.4.2

Freelancers (or managers who have the freelancers reporting into them) may request to defer payment for accrued holidays.

Please explain how this would be handled in the payroll solution.

6.4.3

The system needs to be able to process off-payroll workers (IR35) and deduct PAYE/NI.

Please confirm that the payroll software supports this.

6.5 Payroll Reporting

6.5.1

Please provide an overview of the “out of the box” payroll reporting provided by your system (i.e., reporting and analysis content that’s ready to use). In particular, please provide details of reporting of Maternity, Paternity, and Sick Pay and how they may be used to check against guidelines (e.g., 39 weeks of Statutory Maternity Pay)

6.5.2

Please provide a brief description showing how payroll users could view data in tabular format using filters and field sorts to refine views.

6.5.3

Please provide a high-level overview of the capabilities of the report writing tools provided by the payroll system.

6.5.4

Please confirm that the payroll system supports out of the box statutory reporting such as “Gender Pay Gap Report” and other reports required by ONS.

6.5.5

We need a variance report showing key changes from one month to the next before each payroll run is executed.

Please confirm if such a report is available as standard.

6.5.6

Until confidence in the systems has been established, we would like to spot-check and report to show that the Payroll and HR systems are synchronised.

Please describe how this would be achieved within the payroll system.

6.6 Overseas Payroll

The table below lists the countries where our companies currently operate and where statutory accounts are filed.

Country	Payroll Available (Y/N)

6.6.1

Please indicate the countries for which a payroll solution is available by completing the table above.

6.6.2

For markets where the payroll solution isn't available, please confirm that the software supports the transfer of approved time and expense transactions to a third-party payroll system.

7 System Implementation & Operation

7.1 Implementation Plan & Methodology

7.1.1

Please provide a proposed high-level implementation plan showing possible phasing, resourcing (us and yourself) and approximate overall duration with milestones and deliverables at the end of each phase. Assume a project start date of -.

7.1.2

Please briefly describe the implementation and project management methodologies to be employed during implementation.

7.1.3

Please outline how you will manage the implementation of the solution in countries other than the UK, given time-zone and potential language constraints.

7.1.4

Please describe how training will be delivered to HR & Payroll administrators and to end-users.

7.2 Application Support Methodology

7.2.1

Please provide an overview of the on-going support that you provide once the system has been implemented.

7.2.2

Please outline how the support process(es) described above will be extended to include offices outside of the UK.

7.3 Account Management

It is important to us that they keep abreast of all developments on the platform they purchase.

7.3.1

Please explain how you engage with your customers to ensure they are getting full value from their software and are informed of new/future developments. This may be in the form of formal account management, webinars, user conferences.

7.3.2

Please also explain how you engage with your customers to involve them in future developments on your platform, through things like user forums.

8 Ancillary Information Required

8.1 Office Location

Please complete the table below for the main office of the organisation that will be implementing the proposed solution.

Main Office Location Details	
Address	
Name of primary contact	
Primary contact phone	
Primary contact email	
Services provided from this office (enter Yes/No per line as appropriate)	
Sales	
Implementation Services	
Software Development	
Technical Services	
Support	

8.2 Financial Information

Please complete the table below for the organisation that will be implementing the proposed solution.

Financial and Employee Summary	
Revenue for FY2021 (GBP)	
Profitability for FY2021 (GBP)	

Revenue for FY2020 (GBP)	
Profitability for FY2020 (GBP)	
Revenue for FY2019 (GBP)	
Profitability for FY2019 (GBP)	
Total Employees in 2022	

8.3 Reference Sites

8.3.1 Reference Site Classifications

The tables in the sections below should be completed by supplying a list of live implementations that fall into the following categories (list in order of preference from our point of view):

Reference Site Categories:

1. **-**
2. **-**
3. **-**

Please take care to fully complete each table below. Tables with incomplete information will be disregarded when reviewing and scoring responses.

8.3.2 Implementation Reference

Name of reference organisation	
Nature of business of reference organisation	
Location(s)	
Sector classification (choose from the list in section 8.3.1 above)	
Software system name & version implemented	
Number of employees	
Main modules implemented	
Systems interfaced	
Date of first go-live	
Date of final go-live	
Number of implementation days delivered	

Provide a short narrative expanding on the scope of the implementation, duration and challenges involved in implementation and support.

8.4 Software Applications Proposed

Provide a listing of the software applications proposed for this project by completing the table below.

Application Name & Version Number Proposed	Current Version Number	Vendor Name

8.5 Modules Proposed

For each of the applications listed above in section 8.4, provide a listing of the modules it contains that are relevant to this project and the functional area(s) addressed by each by completing the table below.

Application Name	Module Name	Functional Area(s) Addressed

9 Costs

9.1 Subscription and Implementation Consulting Costs

An Excel-based template has been distributed with this document. The Excel template provided should be used to detail subscription and implementation consulting costs and must be included as part of your response.

Please base your pricing on the functional scope detailed in section 3.2, and the user and employee numbers detailed in section 3.3.

The following points should be noted with regard to the specification of costs.

1. Where subscription costs are not based on a simple multiplier of cost per license by a specified number of users or employees, details must be provided in the Assumptions as to how the licence costs are calculated.
2. If add-on or 3rd party software is included in the costs, a description of each additional software component should be provided in the response to section 8.4 above.
3. All assumptions upon which the costs are based should be clearly stated.
4. Provision of training should be included in the implementation costs.
5. Please include the completed Excel spreadsheet as part of your response.