

Request For Proposal

TITLE: SHARED PAYROLL/BENEFITS MANAGEMENT PROJECT

ISSUE DATE: JANUARY 3, 2018

PURPOSE OF THE REQUEST FOR PROPOSAL (RFP): The Kootenay Boundary Community Services Co-operative (KBCSC) is seeking qualified consulting services to provide shared payroll/benefits management advisory services, policy and protocol work, and program implementation and training to support the KBCSC's efforts in strengthening its Members' operational capacity.

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1. Introduction

The Kootenay Boundary Community Services Co-operative (KBCSC) is composed of non-profit social service-providing agencies in the Kootenay Boundary Region (see list of members in Appendix A). The purpose of the KBCSC is to pursue, deliver, and co-ordinate resources and services provided by and for its members. The Kootenay Boundary Community Services Co-operative:

- helps maintain and support member organisations in the face of challenges such as limited funding and geographic distribution and isolation;
- provides for the members a regional community-based forum for planning, pursuing, and distributing community, social, and health service resources within the context of larger and more inclusive regional forums;
- offers a range of alternatives for providing community, social, and health services, based on what is deemed most appropriate and effective for service recipients;
- serves as a platform for the development of organisationally efficient and effective practices in areas of interest to some or all members;
- strengthens the ability of the member organisations to offer high quality, cost-effective community, social, and health services to the residents of our region, especially those who are not well-served by conventional government services and/or private, for-profit enterprises.

KBCSC member organisations (see Appendix A) work together in partnership to plan and deliver services regional in nature, to develop new ideas through projects, and to support each other. It is through the co-operative model that the members are able to enhance and improve the quality of services they provide to their individual communities and service constituents. For more detailed organisational information, please refer to the KBCSC website: <http://thekoop.ca/>

1.1. Partnership Background

The Kootenay Boundary Community Services Co-operative (KBCSC) and the Columbia Basin Trust (Trust) have a mutual goal of strengthening the capacity of non-profit social service organisations in the Basin, and particularly the fifteen member agencies of KBCSC. To address this goal, a partnership has been established with a core objective of developing and implementing services and supports to strengthen the capacities of member agencies. This includes the following:

- Address common operational challenges faced by members;
- Assist members in strengthening their organisations' foundations;
- Assist members in their commitment to develop and maintain high quality services; and
- Explore and pursue opportunities for members to achieve financial and/or operational benefits.

A key priority of this project is to assist members with exploring and pursuing shared operational solutions/services to achieve financial and operational benefits and to reduce operational risks associated with reliance on one person for payroll/benefits.

1.2. Project Goals

Our broad goals for the project include:

- Reduce individual members' operational risks and increase their efficiencies by implementing a shared services payroll and benefits management system.
- Adopt a unified technology platform and standardized processes, where possible, allowing for resource and knowledge management sharing.
- Develop protocols for shared payroll and benefits management service.

2. Instructions for Proposal Delivery:

2.1. Closing Time:

The Proposal must be received on or before the following date and time:

Date: January 22, 2018

Time: 4:00 PM PT / 5:00 PM MT

2.2. Closing Location:

The Proposal must be received at the following email address: info@thekoop.ca

Faxed Proposals will not be accepted.

When a Proponent elects to submit their Proposal by email then:

- a) The email containing the Proposal will be deemed to have been received at the Closing Location at the date/time stamped/tagged by KBCSC's email system; and
- b) The Proponent assumes the entire risk that the email is received by the addressee and is complete, including the risk that the KBCSC's system will not properly receive the email and any email attachments before the Closing Time. The KBCSC's inability to receive an email or email attachment, for any reason, shall not constitute an exception to the mandatory requirement to submit Proposal by the Closing Time, and the KBCSC assumes no risk or responsibility that any email will be received.

3. The KBCSC's Contact Person

All enquiries related to this RFP, including any requests for information and clarification, should be directed, in writing, to the following person by 1:00 PM PT / 2:00 PM MT January 16, 2018. Information obtained from any other source is not official and may not be relied upon. Enquiries and any responses will be recorded and may be posted to the KBCSC's website: www.thekoop.ca at the KBCSC's option. No oral conversation will affect or modify the terms of this RFP or may be relied upon by any Proponent.

Name: Janice Murphy

Email: info@thekoop.ca

Proponents finding discrepancies or omissions in this RFP, or having doubts as to the meaning or intent of any provision, should promptly notify the KBCSC's Contact Person. If the KBCSC determines that an amendment is required to this RFP, the KBCSC's Contact Person will issue an addendum on the KBCSC's website at www.thekoop.ca.

4. RFP Terms

4.1. Additional Information

The Selection Committee may, at its discretion request clarifications or additional information from one or more selected Proponents with respect to any Proposal. The Selection Committee may, at its discretion, invite one or more of the Proponents to appear before the Selection Committee to clarify their Proposals. In the above events, the Selection Committee will be entitled to consider such clarifications, additional information or answers received in evaluating Proposals.

4.2. Terms and Conditions

This RFP is not an agreement to purchase goods or services. The KBCSC is not bound to select a preferred Proponent, or any Proponent; or to enter into an agreement with the Proponent who submits the lowest-priced Proposal. A Proposal submission indicates acceptance of all requirements and terms stated in this RFP; as well as that the Proponent has carefully read and examined the RFP in its entirety. The Proponent agrees to be bound by the statements and representations made in its Proposal. The KBCSC reserves the complete right to reject all Proposals and terminate this RFP at any time.

4.3. Late Proposals

It is the sole responsibility of the Proponent to ensure its Proposal is received at the Closing Location before the Closing Time. Late Proposals will not be accepted. In the event of a dispute, the receipt time, as recorded at the Closing Location or email system shall prevail.

4.4. Completeness of Proposal

By submitting a Proposal, the Proponent represents that, if this RFP is for Proposals to design, create or implement a system, all components required to run the system have been identified in the Proponent's Proposal or will be provided by the Successful Proponent as part of the proposed cost or fee and at no further charge to the KBCSC.

4.5. Proponents' Expenses and No Claims

Proponents are solely responsible for their own expenses in preparing and submitting Proposals and for any meetings, negotiations or discussions with the KBCSC or its representatives and consultants, relating to or arising from this RFP.

By submitting a Proposal, each Proponent:

- a) agrees that the KBCSC and its members, representatives, consultants and advisors will not under any circumstance be liable for any claims, whether for costs, expenses, losses (including loss of anticipated profits), damages or liabilities that are or maybe incurred or suffered by any Proponent arising from or in any way connected to this RFP and
- b) waives any and all claims against the KBCSC or any of its members, advisors, representatives, consultants or advisors.

4.6. Liability for Errors

While the KBCSC has attempted to ensure the information in this RFP is accurate, the information contained in this RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the KBCSC, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is

intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this RFP and the KBCSC accepts no responsibility for any errors or omissions in the information contained in this RFP.

5. RFP Response Guidance

Please include the following information in your response:

- General overview of your organisation including history, location, staffing levels, staffing practices (e.g. in-house team, contractors, others), project management practices, and quality assurance practices.
- Discussion of your relevant experience with a focus on projects of a similar size and nature to shared payroll/benefit systems for the non-profit community social service sector.
- Three references from past clients.
- Proposed methodology and timelines for completing the Deliverables with an expected project start date of January 29, 2018.
- Your pricing proposal. The pricing proposal should include any taxes, travel, licensing or other costs.

6. Project Requirements

#	Requirement	Priority
1	<p>Work with the three (3) member organisations (see Appendix B) to identify;</p> <ul style="list-style-type: none"> • payroll/benefits business requirements including regulatory needs; • desired outcomes (including expandability to other services); • integration requirements with other systems; and • risks associated with a unified system and ways to mitigate risks. 	Mandatory
2	Assess, identify and prioritize features and functions of shared payroll/benefit service model.	Mandatory
3	Draft protocol on how this shared service would work between involved agencies.	Mandatory
4	Evaluate and source a solution addressing members' business requirements, including interface requirements with existing software used by members, including SAGE and Quick Books.	Mandatory

#	Requirement	Priority
5	Oversee piloting of the software and protocol; evaluate and problem-solve.	Mandatory
6	The KBCSC will retain ownership of any protocols, procedures, and training plans developed.	Mandatory

6.1. Process Deliverables

The successful proponent will initially be required to:

- Meet with the KBCSC Executive Director to gain understanding of the KBCSC, including our history, mandate, and our goals for the project.
- Review all relevant research provided by the KBCSC and meet with the three participating member organisations' representatives (see Appendix B), to gain an understanding of our member organisations and their needs.
- Develop and seek approval from the Executive Director and the three participating member organisation representatives, for their overall approach to the project, including clear definitions of roles and responsibilities, time commitments, timelines, deliverables and all other related project matters.
- Share your progress and work samples with the Executive Director on an agreed reporting schedule via email and phone.

The successful proponent will be required to complete the following within the project scope:

- Design and develop protocol for shared payroll/benefits management service among three (3) member organisations, meeting all requirements.
- Oversee successful pilot implementation of shared payroll/benefits management system.

6.2. Content Deliverables

The successful proponent will deliver the following as part of this project:

- Protocols for non-profit community social service organisations' shared payroll/benefits management system.
- Set-up and implementation of unified technology platform and standardized processes for shared payroll/benefits management system in the three (3) participating member organisations (see Appendix B).
- Training and documentation.

7. Desirable Criteria

The Evaluation Committee will evaluate Proposals meeting all of the mandatory criteria against the following desirable criteria to determine the Proposal(s) that is(are) most advantageous to the KBCSC Members.

Criteria

- a) Demonstrated understanding of the services being sought under the RFP.
- b) Proposed methodology for providing the services.
- c) Qualifications and experience for all parties involved.
- d) Fees and expenses.

The Evaluation Committee may apply the criteria on a comparative basis, evaluating the Proposals by comparing one Proponent's Proposal to another Proponent's Proposal

8. Schedule

The project must be completed within a 12-week schedule, as outlined below:

- RFP Issued: January 3, 2018
- Response Due: January 22, 2018
- Start Date: February 5, 2018
- End Date: April 30, 2018

9. Budget

The Partnership has approved a \$15,000 – \$18,000 budget range for the shared payroll/benefits management system project.

Appendix A: KBCSC Members

Arrow & Slocan Lakes Community Services Society Box 100, 205 – 6 th Ave. NW Nakusp, BC V0G 1R0; 250-265-3674
Boundary Family & Individual Services Society Box 2498, 1200 Central Ave., Grand Forks, B. C. V0H 1H0; 250-442-2267
Castlegar & District Community Services Society 1007 – 2 nd Street, Castlegar, BC V1N 1Y4; 250-365-2104
Circle of Indigenous Nations Society (COINS) 1005 2nd Street, Castlegar, B.C. V1N 1Y4; 250-231-4968
Columbia Basin Family Resource Society 1592 10 Ave, PO Box 2054, Fernie, BC V0B 1M0; Phone:(250) 423-4687
Freedom Quest Youth Services Society 349 Columbia Avenue, Castlegar, BC V1N 1G6; Phone: 250-304-2676
Kootenay Family Place Box 3144, 767 11th Avenue, Castlegar, BC V1N 3H4; 250-365-8448
Kootenay Kids Society 312 Silica Street, Nelson, BC V1L 4M5; 250-352-6678
Kutenai Art Therapy Institute 191 Baker Street, Nelson, BC V1L 4H1; 250-352-2264
Nelson CARES Society 521 Vernon Street, Nelson, BC V1L 4E9; 250-352-6011
Nelson Community Services #201 – 518 Lake Street Nelson BC, V1L 4C6; 250-352-3504
North Kootenay Lake Community Services Society 336 "B" Avenue, Box 546, Kaslo, BC, V0G 1M0; 250-353-7691
Salmo Community Resource Society PO Box 39, 311 Railway Avenue, Salmo BC V0G 1Z0; 250-357-2277
Trail FAIR Society 2079 Columbia Ave, Trail, BC V1R 1K7; (250) 364-2326
West Kootenay Women's Association & Nelson Women's Centre 420 Mill Street, Nelson, BC V1L 4R9; (250) 352-9949
Kootenay Boundary Community Services Co-operative 125 Hall Street, Nelson, BC V1L 7B4; (250) 352-6786

Appendix B: KBCSC Members participating in the shared payroll/benefits management system project

Member Organisations	# of employees	Finance Software	Payroll Software
Kootenay Kids Society 312 Silica Street, Nelson, BC V1L 4M5 250-352-6678	40	SAGE	ADP
Kootenay Family Place Box 3144, 767 11th Avenue, Castlegar, BC V1N 3H4 250-365-8448	47	SAGE	ADP
Nelson Community Services #201 – 518 Lake Street Nelson BC, V1L 4C6 250-352-3504	32	SAGE	ADP