



Devoted to the Future of You.

REQUEST FOR PROPOSALS:

**PAYROLL SERVICES
FOR**

CARLOW UNIVERSITY

January 14, 2025

Proposals Due: January 31, 2025 @ 5:00 p.m. EST

REQUEST FOR PROPOSALS – PAYROLL SERVICES

1.0 Introduction

1.1 Background on the Request for Proposal

- A. Carlow University (the “University” or “CARLOW”) is requesting “Proposals” Carlow University is seeking proposals from qualified vendors for the outsourcing of our payroll services. Our goal is to partner with a trusted and reliable payroll provider to streamline our payroll processing, while ensuring compliance with federal and state regulations. To be considered, written proposals addressing the questions provided herein must be delivered in a sealed envelope, bearing on the outside: the name of the Proposer, the Proposer’s address, the words “Carlow University’s RFP #25-001”, to the Office of Human Resources, Attention: Mary Anne Koleny, EdD, SHRM-SCP **on or before 5 p.m. EST on January 31, 2025** at 3333 Fifth Avenue, Pittsburgh, PA 15213. Late submissions will not be considered.
- B. At the conclusion of this RFP process, and if the cost-benefit analysis supports a change, CARLOW is prepared to select and enter into an agreement with the selected individual and/or firm to assure that CARLOW has ongoing and expeditious access to Payroll Services at competitive (and preferably discounted) rates.

1.2 Carlow’s Mission

Carlow University, rooted in its Catholic identity and embodying the heritage and values of the Sisters of Mercy, offers transformational educational opportunities for a diverse community of learners and empowers them to excel in their chosen work as compassionate, responsible leaders in the creation of a more just and merciful world.

1.3 Overview of the University

Carlow is a private, co-educational, Catholic liberal arts university located in the Oakland neighborhood, the heart of Pittsburgh’s “Eds, Meds, and Tech” district. Founded by the Sisters of Mercy in 1929, this diverse, inclusive Mercy University embodies the values of its founders, offering its students transformational educational opportunities that empower them to excel in their chosen work as compassionate, responsible leaders in the creation of a more just and merciful world.

In today’s societal landscape, these espoused values have never been more relevant.

Consistent with its tradition of academic excellence, Carlow’s curricula and partnerships reflect its strong commitment to social justice, ethical forward-thinking leadership and meaningful service to the community that makes an impact. Carlow offers over 50 undergraduate, graduate and certificate programs, including nursing, physical therapy, occupational therapy, education, business, and more. In addition to the traditional classroom teaching, Carlow offers experiential learning opportunities and internships through regional partnerships. Carlow

provides transformational learning experiences that empower graduates to become forward-thinking, ethical leaders who give back and make a difference in the world.

Carlow's men's, women's and co-ed sports are known as the Celtics, a reflection of the University's Irish heritage and roots.

Address:

Carlow University
3333 Fifth Avenue
Pittsburgh, PA 15213

Website:

www.carlow.edu

Telephone:

412-578-6000

2.0 Summary & Overview

This Request for Proposal (RFP) serves as a foundation for engaging a vendor who can deliver high-quality solutions that align with our payroll needs. Respondents are expected to thoroughly address each section to demonstrate their ability to meet or exceed Carlow's requirements.

The primary goal of this RFP is to solicit proposals from qualified firms that can provide comprehensive **payroll services**, and offer the best overall fit for CARLOW. The RFP includes providing detailed responses to the following critical questions in other HR-related areas, to ensure alignment with Carlow's goals and requirements. **Note: Pricing for the items listed below under "Additional Solutions for Carlow Consideration" should be quoted separately, as the primary focus for this RFP relates to payroll services.**

Human Capital Management (HCM) solution overview

1. Provide an overview of your HCM solution, including how it can meet current and future client needs. Provide a detailed overview of your solution's architecture and hosting.
2. Describe your automated approval, notification, and workflow capabilities.
3. Describe and detail the variety of options (third-party interfaces to complete system integration) that you make available to organizations that purchase your proposed product
4. Please describe any advisory or consulting services that your organization offers to optimize your HCM solution. Is there an additional cost for those services?

Payroll

1. Provide a detailed overview of your payroll solution, including steps and turnaround time to process payroll. Describe the methods available for paying employees (e.g., direct deposit, pay card, or manual check).
2. Describe support for employees who concurrently work in multiple tax jurisdictions. How will Carlow interface payroll with their general ledger (GL) financial system?
3. Describe your year-end process, W-2 support, and tax filing (including client and vendor responsibilities).
4. How will tax deposits and tax filing be handled? How do you handle inquiries, discrepancies and resolution for any federal, state or local tax inquiries?
5. Describe your global payroll offering. What countries do you support?

User experience

1. How does your solution enhance the employee experience and improve employee engagement? Describe employee, manager and practitioner self-service capabilities.
2. Describe the benefits of your solution's mobile capabilities.
3. How can your solution allow Carlow to manage both employees and contractors?

Compliance

1. How can your solution help us abate risk when associated with taxes, garnishment, ACA and any other processes that are required for each of our locations?
2. Explain how your solution accommodates EEO, OFCCP, ACA, I-9 and other compliance reporting requirements.
3. How can your solution assist us in identifying and capturing tax credits we may be eligible for?
4. Describe how you ensure global payroll compliance with legislative requirements for different countries.

Workforce Management

1. Describe your time and attendance solution and the primary features it delivers.

2. Explain how your solution will enable real-time management of overtime, attendance and leave policies for both employees and contractors.
3. How does your time and attendance solution integrate with your HCM and payroll systems? What differentiates your time and attendance service and support?

Reporting and analytics

1. Describe standard and ad hoc reporting functionality. Please provide a list of pre-built reports and metrics. Describe your workforce analytics and benchmarking capabilities.
2. What kind of predictive analytics are available for managers and administrators?
3. What kind of modeling and forecasting are available now, and what can we expect in the future?
4. Describe your solution's import/export data tools and capabilities, including mass data loads and bulk changes.

Security

1. Describe the technology and process for safeguarding the privacy of customer and employee data. How does your solution allow for user security? Describe your application's security model.
2. Explain the different permission and security levels that can be assigned within the solution. How can these permissions be customized?
3. Please outline your Business Continuity/Disaster Recovery plans.

Strategic direction

1. How will you partner with us to develop and strengthen our HCM strategy into a competitive advantage? Describe your scalability strategy and how the solution allows for growth.
2. How are you planning to incorporate artificial intelligence into your solution?
3. Describe your strategic alliances and partnerships and how you use them to benefit clients. How can your solution help us reduce cost and increase efficiency?

Implementation

Carlow University
RFP for Payroll Services

1. Describe your implementation methodology and key milestones.
2. Describe the tenure and experience of your implementation team resources.
3. Do you leverage third parties to implement your solution? If so, please provide a list of approved third parties. How would you handle a phased implementation approach? Would additional fees apply?
4. When are clients able to test solution features using their own data? Describe your approach to initial client training and user adoption.

Service

1. Once the solution has been implemented, who provides the service? Is it handled internally or by a third party? What is your approach to customer success? How do you measure client satisfaction?
2. Describe your service delivery team. What are their operating hours and availability? Will a specific service contact be assigned?
3. How can clients contact your support staff and how are client inquiries managed until resolution? What online tools and support do you offer clients?

Additional Solutions for Carlow Consideration

Human Resources (HR)

1. Provide a brief overview of your HR solution and related HR capabilities.
2. Explain how your solution can help Carlow throughout the new hire, rehire and termination processes. Describe onboarding capabilities and the ability to notify new hires of activities to complete.
3. Describe your electronic/digital employee document management capabilities. Outline the process to transfer employees from one entity or pay group to another.
4. How does your solution accommodate FMLA tracking, parental leave tracking, and/or administration of both?

Benefits

1. Describe your health and welfare benefits administration functionality and its interface with your solution.
2. Explain the enrollment events supported by your solution (annual enrollment, new hire elections, life events and status changes).

3. Describe how your system applies business rules and logic checks to determine benefits eligibility (includes calculation of dependent eligibility).
4. Provide an overview of your leave administration solution.
5. Describe your coordination services with disability and worker's compensation vendors.

Talent acquisition

1. Provide an overview of your solution's key recruiting activities and how it interacts with the HCM solution. Describe how your solution can positively impact the candidate, recruiter and hiring manager's experience. How does your solution leverage HCM data to create requisitions?
2. Describe the ease of posting openings to an unlimited number of corporate talent sites, commercial job boards and external job aggregators.
3. Detail your candidate pre-screening or qualification process.

Talent activation

1. What coaching tools are available to managers when interacting with their teams? What coaching tools are available to individual employees?
2. Describe the employee-to-manager and manager-to-employee communication and feedback mechanisms associated with your solution.
3. Explain how your solution supports engagement surveys, including any tools that will help managers understand and improve employee engagement.
4. What tools or communications support engagement on an ongoing basis?

Performance Management

1. Provide a brief overview of your performance management solution.
2. How can your solution help align goals across our university?
3. Describe your ability to configure an end-to-end performance management process, including varying review cycles, workflows, evaluation types, rating requirements, etc.

4. What competencies are delivered with your performance management solution?

Compensation Management

1. Provide a brief overview of your compensation solution.
2. How can we apply rules and metrics to align compensation with our overall strategic initiatives? Describe how budgets are allocated and allow for real-time tracking of budget dollars.
3. How can the solution help managers make effective compensation decisions?

Succession planning

1. Provide a brief overview of your succession planning solution. How are succession plans created?
2. How does your solution help managers identify potential successors and assess their readiness? Explain how the solution can assist employees in career development planning.

Company information

1. Briefly describe your organization's business background, history and current financial health. What are your top competitive advantages as an organization?
2. What is your average client retention rate and tenure?
3. When do you start billing your fees?
4. What is your firm's statement regarding its commitment to social justice?
5. What kind of long-term support and value-added services do you offer now and what are you developing?

A. Conflict of Interest

All Respondents must disclose the name of any officer, director or agency who is also an employee of Carlow University. All Respondents must disclose the name of any Carlow employee who owns, directly or indirectly, any interest in the Respondents' business or any of its campuses. Such disclosure must be submitted as a cover letter included with the Request for Proposal, addressed to the Assoc. VP, Human Resources & Chief HR Officer no later than the proposal due date of January 31, 2025.

B. Fee

CARLOW will review the payroll options, and potentially select a firm to provide Payroll Services. CARLOW may choose, in the sole exercise of its discretion, one of the Respondents. In addition, selection of a Respondent pursuant to this RFP does not guarantee that CARLOW will award a contract for Payroll Services to any of the firms responding to this RFP.

CARLOW prefers a payment schedule which breaks down the total yearly cost into equal installments, paid throughout the year, such as, bi-annually, quarterly, or monthly. Carlow's preference is Net 60, although Net 45 is a consideration.

C. Proposal Submission Content

Proposals must include all information listed below:

- a. Cover Letter
- b. Respondent Qualifications
- c. Answers to all applicable questions asked in Section 3.0
- d. Full costs broken down by service provided
- e. List of three (3) references

3.0 Submission of Responses

3.1 Schedule

3.1.1.1 The RFP process will proceed according to the following anticipated schedule:

ACTIVITY	DATE
RFP Issued for Payroll Services	Tuesday, January 14, 2025
Full Proposals Due	Friday, January 31, 2025 (5:00 p.m. EST)
Potential Interviews	Month of February, 2025
Contract Awarded	Monday, March 3, 2025

3.1.1.2 Responses must be received by CARLOW at the address set forth in Section 3.2 (b) no later than **5:00 p.m. EST, on Friday, January 31, 2025**. An electronic response may be accepted by CARLOW for purposes of meeting the response submission deadline only, provided that it is received by CARLOW within the deadline set forth above and further provided that the electronic response is followed up by delivery of a hard copy that must be received by CARLOW within forty-eight (48) hours

after CARLOW's receipt of the electronic response and that such hard copies do not vary, modify or correct the electronic response provided. CARLOW shall determine in its sole discretion whether the response has been received within the deadlines established herein. CARLOW shall not be responsible or liable in any way for late delivery or receipt of responses for any reason whatsoever including, but not limited to, equipment, technical, or network malfunction. Respondents shall assume the risk that an electronic submission may not be received by CARLOW within the deadlines established in section 3.1(b) because of equipment, network or technical malfunction.

- 3.1.1.3 The responses will be evaluated pursuant to the criteria set forth in this RFP. Notification of selection or non-selection of all Respondents who submitted conforming responses will be mailed when the prequalification selection process is final.
- 3.1.1.4 All respondents are solely responsible for obtaining and completing the required attachment identified in the RFP and for checking any modifications that are subsequently made to this RFP or its attachment(s).
- 3.1.1.5 The selected Respondent(s) will execute the Payroll Services Agreement. RESPONDENTS ARE REQUIRED TO SPECIFY ANY EXCEPTIONS TO THE MASTER SERVICES AGREEMENT AND TO MAKE ANY SUGGESTED COUNTERPROPOSAL WITH THEIR RESPONSE. CARLOW WILL REVIEW ANY SUCH SUGGESTIONS, BUT RESERVES SOLE RIGHT TO ACCEPT OR DENY SUCH SUGGESTIONS. A FAILURE TO SPECIFY EXCEPTIONS AND/OR COUNTERPROPOSALS WILL BE DEEMED AN ACCEPTANCE OF THE MASTER SERVICES AGREEMENT'S TERMS AND CONDITIONS.

3.2.4 **Proposal submittal**

Proposals must be received by CARLOW no later than **5:00 p.m. EST on Friday, January 31, 2025** at the street and e-mail address indicated at the bottom of this section. Proposals must be limited to ten 8½" x 11" pages and clearly marked "CARLOW PAYROLL SERVICES." Firms shall submit one unbound, reproducible original copy of the proposal and four bound copies to the street address below **and** submit the proposal in PDF format to the e-mail address below.

Mary Anne Koleny, EdD, SHRM-SCP
Assoc. VP & Chief Human Resources Officer
Carlow University
3333 Fifth Avenue

Pittsburgh, PA 15213
mskoleny@carlow.edu

4.0 Evaluation Criteria

All proposals must meet or exceed mandatory requirements outlined in this RFP in order to be reviewed. Those proposals meeting the minimum mandatory requirements will be considered based upon a point scoring evaluation system described in this section. Evaluations and selection will be based on written qualification and oral presentation, if deemed necessary, with emphasis on Respondent Qualifications, Answers to Questions, Interviews, and Total Cost of the proposal. Considerations will also be made to respondents with shared values and/or MWDBE certification. The maximum possible for the combined areas will be 100 points.

5.0 Other Information

- A. The University reserves the right to seek additional information from any responding party and to schedule interviews with one or more of the responding firms.
- B. Carlow University reserves the right to reject any and all Proposals, to waive any minor informality in the Proposals or to enter into any contract deemed by the University to be in its best interest.
- C. The University reserves the right to amend this RFP at any time and negotiate the scope of services and/or fee terms with one or more of the responding firms.

6.0 Equal Employment Opportunity, Non-Discrimination and Affirmative Action

CARLOW is committed to equal employment opportunity and non-discrimination in contracting for goods and services necessary to perform its business. CARLOW will take affirmative action to ensure equal employment opportunity and to eliminate discriminatory barriers. CARLOW will strongly consider the Respondents' commitment to equal employment opportunity and affirmative action in selecting the individuals or firms for Payroll Services and Respondents are encouraged to propose a team that reflects such diversity. As set forth in Section 3.3(1) of this RFP, Respondents are required to submit copies of their employment and affirmative action policies demonstrating their commitment to equal opportunity, non-discrimination and diversity. Respondents are encouraged to propose a team reflecting its commitment to diversity.

7.0 General Information & Other Provisions

- A. CARLOW reserves the right to cancel or modify this RFP, in whole or in part, or reject all Proposals submitted in response to this RFP if such action is determined to be in the best interest of the University. CARLOW may extend the deadline for submission of Proposals if, in CARLOW's judgment, such extension is necessary for any reason. If CARLOW determines that it is necessary to revise any part of this RFP, or if CARLOW determines

that additional data is necessary to clarify any of its provisions, an Addendum will be posted on CARLOW's website at www.carlow.edu. CARLOW's failure to provide such notification shall not relieve interested individuals and firms desiring to submit a proposal from their responsibility to obtain the Request for Proposals and any and all addenda that may be issued in connection with this RFP.

- B. CARLOW reserves the right to reject any and all responses if CARLOW determines, within its sole discretion, that it is in the best interests of CARLOW to do so, CARLOW reserves the right to reject any Response that fails to meet any of the terms, conditions, requirements, and procedures included in this RFP. If a Respondent fails to meet any material terms, conditions, requirements or procedures, the Response may be deemed unresponsive and disqualified.
- C. All expenses and costs, including but not limited to legal costs, associated with developing or submitting a proposal in response to this RFP, or associated with oral or written clarification thereof, including all presentation materials and related costs and travel expenses, shall be borne solely by the responding firm, and under no circumstances shall CARLOW be responsible for any such cost or expense incurred by any responding firm. CARLOW assumes no responsibility for these costs and expenses.
- D. Responding firms may withdraw their proposals, by written request only, received by CARLOW prior to, but not after, the time set for proposal submission. Thereafter, proposals shall be irrevocable for a period of not less than sixty (60) days and may not be withdrawn or modified.
- E. Any proposal which is not received by CARLOW by the date and time and at the location for submission of proposals set forth herein will be determined to be late and shall not be considered.
- F. CARLOW reserves the right to waive any irregularities or requirements; and to negotiate with all respondents, in any manner necessary, in its sole judgment and discretion, to serve the best interest of CARLOW.
- G. All responses, proposals, related documentation and information submitted in response to this RFP are subject to the Pennsylvania Freedom of Information Act, regarding public access to such documents. Any statements submitted by the respondent that purport to reserve any confidentiality or privacy rights in submitted responses or that are otherwise inconsistent with these statutes will be void and disregarded. By submitting its Response to CARLOW, the Respondent agrees that CARLOW shall not be liable under any circumstances for the subsequent disclosure of any materials submitted to it by Respondent pursuant to this RFP and/or in connection with any contract entered into between Respondent and CARLOW as a result of the RFP process.
- H. Further, any selected Respondent must recognize that in the performance of the Master Services Agreement, and any contract issued thereto, it may become a holder of personal data or other information deemed confidential. Respondent shall comply with the laws and regulations relating to confidentiality and privacy, including any policies and procedures of CARLOW. Any questions concerning issues of confidentiality, the submission of materials to CARLOW, or any other questions related to these matters, should be directed

to Dr. Mary Anne Koleny at mskoleny@carlow.edu.

- I. Unless otherwise specified in this RFP, all communications, responses, and documentation must be in English, and all cost proposals or figures in U.S. currency. All responses must be submitted in accordance with the specific terms of this RFP.
- J. Respondents are prohibited from communicating directly with any employee of CARLOW, except as specified in this RFP, regarding the RFP, and no other individual CARLOW employee or representative is authorized to provide any information or respond to any questions or inquiries concerning this RFP. Respondents may contact the Contact Person for this RFP provided in Section 3.2.4, in the event that this RFP appears incomplete in any way.
- K. CARLOW may provide reasonable accommodations, including the provision of material in an alternative format, for qualified Respondents with disabilities or other hardships. Respondents requiring accommodation shall submit requests in writing, with supporting documentation justifying the accommodations, to the contact person listed in Section 3.2.4 above. CARLOW reserves the right to grant or reject any request for accommodations.
- L. If a Respondent is unable to meet any of the specifications required in this RFP, the Respondent's response must include an alternative method for meeting such specification by identifying the specification, the proposed alternative and thoroughly describing how the alternative achieves substantially equivalent or better performance to the performance required in the RFP specification. CARLOW will determine, in its sole discretion, if a proposed alternative method of performance achieves substantially equivalent or better performance.
- M. Costs that are not specifically identified in the Respondent's response and not specifically accepted by CARLOW as part of a Contract will not be compensated under any Contract awarded pursuant to this RFP. CARLOW shall not be responsible for any costs or expenses incurred by Respondents in responding to this RFP.
- N. The Respondent may not alter the RFP or its components except for those portions intended to collect the Respondent's response. Modifications to the body of this RFP, specifications, terms and conditions, or which change the intent of this RFP are prohibited. Any modifications other than where the Respondent is prompted for a response will disqualify the bid. The foregoing notwithstanding, proposed exceptions and/or counterproposals to the Master Services Agreement are permitted to be submitted with a Response.
- O. Respondent's submitted Response shall be treated by CARLOW as an accurate statement of Respondent's capabilities and experience. Should any statement asserted by Respondent prove to be inaccurate, misleading or inconsistent with the foregoing, such inaccuracy or inconsistency shall constitute sufficient cause for rejection of the Response and/or of any resulting contract. CARLOW, within its sole discretion, will rule on any such matters and will determine appropriate action.
- P. Prior approval by CARLOW is required for any subcontracted services under any Master

Services Agreement entered into as a result of this RFP. Selected Respondent contractors are responsible for the satisfactory performance and adequate oversight of their subcontractors. Subcontractors are required to meet the same requirements and are held to the same reimbursable cost standards as the selected Respondent contractors.

- Q. Master Services Agreements entered into as a result of this RFP shall be on a fee for service basis. Once the Respondent has been selected and executed a Master Services Agreement, CARLOW intends to award all contracts for Payroll Services based on either (1) bids submitted by selected Respondents, or (2) based on CARLOW's sole discretion in determining which of the selected Respondents presents the best value option (the "List Selection"). Procurements done by either Bids or List Selection shall be deemed competitive. It is further anticipated that the term of the Master Services Agreement entered into pursuant to this RFP will be for a term of at least twenty-four (24) months, with CARLOW's option to renew it in its sole discretion.

8.0 Responsiveness & Irregularities

- A. Any proposal determined to be non-responsive to this RFP, including instructions governing the submission of proposals, will be disqualified without evaluation unless the evaluation committee determines that the noncompliance is insubstantial.
- B. CARLOW reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to request modifications of the response, to request clarification of the response, and to accept or reject any or all of the responses received.

Thank you in advance for your interest in providing payroll services to Carlow University.



Mary Anne Koleny, EdD, SHRM-SCP
Assoc. VP & Chief Human Resources Officer
Carlow University

Attachment A: Authorized Representative's Signature and Acceptance Form

ATTACHMENT A

CARLOW UNIVERSITY
AUTHORIZED RESPONDENT'S SIGNATURE AND ACCEPTANCE FORM

The undersigned is a duly authorized representative of the Respondent listed below. The Respondent has read and understands the RFP requirements. The Respondent acknowledges that all of the terms and conditions of the RFP are mandatory, and that Respondent's response is compliant with such requirements. The Respondent understands that, if selected by Carlow University ("CARLOW"), the respondent and CARLOW will execute written agreements specifying the mutual requirements of participation. The Respondent agrees that the RFP will be incorporated into and made part of any Agreement resulting from the Respondent's response to the RFP. The Respondent further agrees to the contract terms in CARLOW consultants' Master Services Agreement. Respondent agrees that the entire bid response will remain valid for sixty (60) days from the proposal due date to CARLOW.

I hereby certify that: (a) I am an authorized representative of the Respondent herein; and (b) the statements made in this response to the RFP for Payroll Services, including all attachments and exhibits, are true and correct to the best of my knowledge.

Respondent: _____
(Printed Name of Respondent)

By: _____
(Signature of Authorized Representative)

Name: _____

Title: _____

Date: _____