Request for Proposal
Municipal Scheduling & Timekeeping Software

Issued: May 21, 2024
~~**Proposals Due: June 11, 2024**~~
Revised Due Date: June 18, 2024

Description

The Town of Rolesville is seeking cloud-based scheduling and timekeeping software for multiple departments to manage and track staff time.

Background

Rolesville is a rapidly growing municipality of approximately 10,000 residents, located to the northeast of Raleigh. The Town currently has about 60 permanent employees and up to 30 seasonal staff.

A majority of the employees work a standard 40-hour FLSA period, and 24 employees work a modified DuPont schedule (Police). In the future, the Town anticipates adding an additional 12 employees who work a 24-hour 3-4 Schedule (Fire). All active employes are paid on a bi-weekly, 14-day pay schedule. The Town exercises the FLSA 7(k) exemption for police (171 hours over 28 days) and fire (212 hours over 28 days).

Current software:
- Permanent employees enter their time worked and make leave requests via Tyler Technology *ERP Pro 10* module *Employee Access Pro*.
- Public safety departments use spreadsheets to manage shift schedules.
- The software *PowerDetails* is used to offer, track, and manage off-duty opportunities for the Police Department.
- The software *Homebase* is used to offer, track, and manage the Parks and Recreation Department's seasonal staff.

Payroll is processed in-house using Tyler Technology *ERP Pro 10* software. The Town does **not** anticipate making a change to the payroll processing software, as it is fully integrated with the Town's financial system.

We are seeking a solution that is focused on 1) **scheduling** for 24/7 service providers and seasonal employees, and 2) consolidating the various **timekeeping** software programs into one product.

Scope of Services
A successful software proposal will be able to meet the following requirements:

General
- Able to integrate seamlessly with the *ERP Pro 10* Payroll module. Export to csv file may be suitable for this requirement, provided specific information can be included in the file.
- Cloud-based with a web portal for easy administrative management.
- Have an end-user-friendly app that is device-agnostic, easily readable on multiple platforms, and will work with both Apple and Android devices.
- Ability to generate both standard and ad hoc reports. For example:
  - Hours worked per employee over specified time period – both in total and by type (e.g. regular, overtime, sick, etc)
  - Hours worked in Department over specified time period – both in total and by type (e.g. overtime hours worked in Police in all of 2025)
  - Number of off-duty assignments worked by an employee over specified time period.

Scheduling
- Able to accommodate various shift schedules over the employee base (ex: standard 40-hour FLSA workweek, modified DuPont, 24-hour 3-4 Schedule, etc).
- Ability to auto-schedule employees up to 12 months in advance, based upon assigned shift.
- Calendar function which allows supervisors and schedule-keepers to see the employees working on a specific day.
- Platform to show schedule-keepers open work opportunities, preferably in a visual format so they can see if all slots are filled to meet minimum staffing needs.
- Ability to offer open shifts for employee self-selection. Must be able to restrict which employees can accept open shifts based upon their assigned role (e.g. only Recreation Assistants can select scorekeeping shifts, and only Police Officers can select off-duty shifts).
- Supervisory approval process for employee self-selection of open shifts. Ability for supervisor to deny or approve shift requests.
- Automatic notification to eligible employees of shifts available for self-schedule via their preferred method: email, text, phone app notification, etc.
- Calendar function which allows employees to see what hours, location, and type of shift (e.g. regular duty, off-duty) they are assigned.
- Function which prohibits double scheduling of employees (i.e. an employee cannot self-select a shift that conflicts with another assigned shift).

Timekeeping
- Allows employee to select among multiple types of hours (work and leave) such as: Time Worked, Sick Leave, Vacation Leave, Holiday Leave, etc.
- Ability to associate a Pay Code in the *ERP Pro 10* system to each type of hours in the timekeeping system.

- Ability to group employees for timekeeping submittal, approval, and reporting (e.g. by Department).
- Ability to configure multi-level approval of time submittal (e.g. Sergeant, then Lieutenant, then Captian, etc).
- Time submittal review:
  - Ability to see hours claimed in the FLSA period – both as a total and by type, as well as hours claimed in the payroll period – both as a total and by type.
  - Ability to return time submittal to employee for correction or update.
  - Automatic notification to employee of returned time via their preferred method: email, text, phone app notification, etc.
- Notification/warning to employee if they exceed the standard work hours in a time period (e.g. maybe some hours of leave time are not needed). Ability to customize that notice/warning.
- Ability to clock in and clock out using a portable device (e.g. smartphone). Temporary access to GPS location on that device to track where employee was at time of clock in and clock out.
- Ability to opt-out of clock in and clock out function (i.e. not all employees will use this feature).
- Exception Time reporting for exempt employees who just need to submit leave hours.
- Leave requests for scheduling:
  - Ability for employee to request leave usage in advance.
  - Ability for multi-level supervisors to approve or deny that request.
  - Pre-approved leave automatically populates for the schedule.
  - Pre-approved leave can also be edited in case requested leave was not used.

Proposal
Submitted proposals should contain the information outlined below:
- Letter of Intent to include name, title, email address, and telephone number of the proposal contact person(s) who are authorized to represent the vendor.
- Background of the company and relevant experience.
- Description of the ongoing customer support offered.
- Response to EACH of the bulleted requirements listed in the Scope of Service outlined above. While written detail is preferred, writing a "yes" or "no" next to each one to indicate ability exists within in the software is acceptable.
- Supplementary brochures or information about the software.
- Pricing to include any one-time start-up costs, as well as annual pricing or pricing structure.
- References from 3 municipal clients of about the same population size, with preference for those located in North Carolina.

Selection Process

Proposals will be evaluated based on:

1. Ability to meet the requirements listed in the Scope of Services.
2. Experience providing similar services in the government sector.
3. Cost of services.
4. Performance history per references.
5. Quality of customer service support.

A multi-department team will review all submitted proposals. The top vendors will be selected for an online software demonstration.

Timeline & Submission

Responses are requested by ~~June 11~~, June 18, 2024 and may be submitted via email, in person, or mail to:

> Kisha Robinson, Accounting Specialist
> Town of Rolesville
> PO Box 250
> Rolesville, NC 27571
> kisha.robinson@rolesville.nc.gov

Estimated implementation in late summer 2024.

General Requirements

- This solicitation and any subsequent contract shall be awarded consistent with and governed by the laws of the State of North Carolina.
- Proposals submitted shall not be subject to public inspection until a contract is awarded.
- The Town reserves the right to reject any or all proposals and to waive any informalities as may be permitted by law.
- The Town reserves the right to request oral interviews or request additional information from any or all vendors.
- The Town reserves the right to award a contract based on proposals received without further discussion or negotiation.
- All proposals shall be signed by an authorized officer or employee of the submitting organization. The name of the company, contract person, telephone number, fax number, and address shall be included.
- The RFP does not commit the Town to pay any cost incurred in the submission of a proposal, or in making necessary studies or designs for the preparation thereof.
- If the term of this contact extends into fiscal years subsequent to that in which it is approved, such continuation of the contact is subject to the appropriation of funds by the Town Board. If sufficient funds are not authorized, the parties mutually agree that the contract may be terminated or amended.