Invitation to Tender:

Supply of HR and Payroll Systems and Associated Support Services

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SECTION 1

Instructions and Information for Tenderers

Invitation to Tender

Early Years – the organisation for young children, seeks to invite suppliers to respond to this Invitation to Tender (ITT) document for the provision of HR and Payroll Systems and Associated Support Services. This is a long term investment for Early Years and duration of contracting will depend on pricing structures in bids received.

Submission of Tender Documents

Completed proposals, including all appendices should be submitted via email to humanresources@early-years.org, with subject line "Tender Document Reference: EY02023/HR/01"

All tender documents must be returned no later than **10am** on **Friday 19 May 2023.**

Please note that:
   I.   The tenderer is fully responsible for the safe and timely delivery of the tender.
  II.   Documents must be formally submitted prior to the final submission date in order to be considered for evaluation.
 III.   Late tender submissions will not be accepted.
 IV.   All submissions must be in English.
  V.   All prices should be in Sterling and be exclusive of VAT.

Clarification

Before submitting the tender documents, tenderers should seek to clarify any points of doubt or difficulty with the below-named person. Requests for clarification should be submitted via email, with subject line "Tender Document Reference: EY02023/HR/01" and must be received by **Friday 28 April 2023 at 10am**.

Point of Contact

Any queries should be addressed to Gillian Totten gilliant@early-years.org.

Written Acceptance

Acceptance of the tender by Early Years will only be made by written instruction to the successful contractor.

Costs and Expenses

Early Years will not be responsible for any expenses or losses that may be incurred by any tenderer in preparing their tender submission.

Award of Tender

Early Years reserves the right not to award a contract to any tenderer under this process.

Contract Period

For comparative purposes, all bidders should submit their bid covering a period of five years from 1 September 2023. However, Early Years reserves the right to contract with the successful bidder for a shorter or longer period.

We would anticipate going live with the new system from 1 September 2023.

Timescale

Contract will be awarded no later than 30 June 2023.

Evaluation Criteria

Tenders will be evaluated using a two-stage process:

- Stage 1 – evaluation of bids submitted and shortlisting.
- Stage 2 – a demonstration/interview. Only shortlisted bidders will be invited to stage two.

Tenderers must not make assumptions that Early Years has prior knowledge of their service provision. Tenderers will only be evaluated on the information provided in their responses.

Whilst every endeavor has been made to provide tenderers with an accurate description of the requirements, tenderers should form their own conclusions about the methods and resources needed to meet these requirements. Early Years cannot be held responsible for tenderers assessment of the requirement.

Tender submissions will be assessed against the qualitative and quantitative criteria detailed within this section.

	Maximum Available Score 100
Qualitative Criteria	
C1. Company overview and Previous Relevant Experience	10
C2. Approach to Delivery	10
C3. Meets functional and non-functional requirements	50
Quantitative Criteria	
Tender Cost (exclusive of VAT)	30

Key to Scoring

To ensure consistency and equity the evaluation panel will assign scores for quality of response to the qualitative requirements using the scores and indicators below which will be weighted to the scoring above:

Score	Descriptor
0	Failed to address the criterion.
1	Poor proposal to address the criterion.
2	Limited proposal to address criterion.
3	Acceptable proposal to address the criterion.
4	Good proposal to address the criterion.
5	Excellent proposal to address the criterion.

Threshold Score

If tenderers score **1 or 0** in the following qualitative criteria **C1, C2 and C3** then it shall be deemed that they have failed to meet the specification and their tender will be eliminated from the competition.

Quantitative Criteria

The cost of delivery over five years will form the basis for assessing the financial component of the bid.

The lowest price will be awarded the maximum score of 30.

To calculate the score for the remaining price, the following formula will be applied. The lowest tendered price divided by the tenderers price multiplied by 30.

SECTION 2

Specification

Introduction

Early Years is the largest organisation in Northern Ireland working with and for young children. We are a non-profit making organisation and have been working since 1965 to promote high quality childcare for children aged 0 - 18 and their families. Early Years is a membership-based organisation, a registered charity, a company limited by guarantee and is governed by a Board of Directors. With a staff count circa 240, based throughout Ireland, predominantly in Northern Ireland in homes and satellite offices.

Early Years currently use a HR system that is hosted on premises at the Belfast office. Information is manually transferred between the HR and Finance teams where Payroll is managed using Sage 50 Payroll. Information is manually transferred between Sage 50 Payroll and Sage 200 Std.

The current Human Resources (HR) information management system has reached the end of its support lifecycle and there is a requirement for a new integrated HR and Payroll management system.

The HR and Finance teams are based in Belfast and work from the office and from home using desktop apps to access the systems. Other employees use self-service features of the HR system via web browser using a computer or a mobile phone and are dispersed across Northern Ireland and beyond.

Description of different types of users that may have unique requirements.

- **HR Team**

All HR processes to be managed via the system with HR having full access. HR to also manage the employee self-service system. Functionality to include multiple employers.

- **Finance**

Processing of payroll via the system.

- **Employee**

Employees having access to make requests via a self-service system that can be accessed via a mobile device. This includes but is not limited to requests for various types of leave, submission of timesheets and expenses, annual declarations including criminal

convictions and conflict of interest and requests under HR policies e.g. career breaks, flexible working.

- Various shift patterns

Over 50 working patterns across the organisation including term time.

- Multiple contracts

Staff can have two jobs at any one time.

- Various entitlements

Entitlements can differ for annual leave, sick leave, maternity/paternity leave etc

- **Line manager (employed by Early Years)**

Line managers having access to approve requests using the grandparent principle. Granular access to employee records. Carrying out HR processes including, but not limited to change of contracts, performance development reviews etc.

- **Line manager (employed by external organisation, manages staff in Early Years)**
As above.

Currently there are 10 line manager accounts of non-staff members, managing Early Years staff

- **Bank staff**

Early Years has a pool of people that we can call on as and when work becomes available. These bank staff should be managed via the system and have functionality to enable processes (including but not limited to annual leave).

Requirements

Functional Requirements

1. Core HR

- Contracts
  - including acting up, secondments, temporary flexible arrangements and multiple contracts.
- Contract variation
- Career history (internal)
- Annual leave, sick leave, maternity/paternity leave, flexi, TOIL, working from home, bereavement, marriage leave
- Document management with granular access controls for HR team/line manager/employee
- Training
  - Booking system
  - Attendance management
  - Email communication with trainees
  - Evaluations
  - Link to Outlook calendar
- Disciplinary
- Performance development reviews
- Probationary reviews
- 1-2-1s
- Exit interviews.

2. Recruitment

- Recruitment – direct entry
  - Web based recruitment
  - Internal and external recruitment
  - Email communication with candidates
  - Ability to adapt online application form and process
- On boarding
  - Collecting documentation
  - Issuing documents / policies with read receipts
  - Email communication with recruits

2. **Employee Self-service**
   - Annual leave, flexi leave, TOIL, sick leave, maternity/paternity, working from home, bereavement, marriage leave
   - Timesheets
   - Expenses
   - HR processes including but not limited to career breaks, flexible working, hybrid working.
   - Update key information including but not limited to address, bank details, next of kin
   - Recording CPD
   - View contract/career history records
   - Booking learning and development events
   - Annual declarations (criminal convictions, conflict of interest)

3. **Manager Self-service**
   - Approval of requests
   - Hierarchy of approval
   - Performance development reviews
   - Document management with granular access controls for HR team/line manager/employee
   - Ability to view employee details including but not limited to; annual leave, sick leave, contracts, personal details, next of kin.

4. **Bank Staff**
   - Managing leave
   - Timesheets

5. **Workflows**
   - Line management approval
   - Approval using grandparent principle
   - Custom workflows.

6. **Alerting**
   - Policy reminders
   - Yearly/recurring checks
   - Push notifications

7. Reporting

- Equality returns (annual return and Article 55)
- Sickness reports
- Annual leave
- Training evaluations
- Recruitment reports
- Ad-hoc data analysis / Report builder with data dictionary
- Data API and compatibility with standard business intelligence applications

8. Native payroll processing or suitable integration with Sage Payroll and Sage 200 Std

9. Customisation

- To have the option to customise some fields within the system including labels and add new fields and records where required.

Non-Functional Requirements

1. Migration of existing information from current system
2. Cloud native design with capacity to scale up and down as staff numbers change
3. High levels of assurance around data segregation, cyber and information security
4. Control over geographic location of information (UK/EU)
5. Role based permissions.
6. Authentication using MS Office 365 including two factor authentication.
7. Separate development / test / training environment
8. Highly available
9. Independent backup and recovery options
10. Minimum performance guarantees
11. Accessible on a variety of devices including computer, tablet, Android and Apple Smart Phones.
12. GDPR Compliance Features including but not limited to:
    - Retention periods and disposal processing
    - Global search, report, redact and export.

Additional Notes

Tender Submission

Tenderers should submit detailed proposals showing how they will address the objectives as outlined above.

Tenderers should complete and return Annex 1 along with detailed responses to Qualitative Criteria **C1, C2, C3**.

Qualitative Criteria

To be considered, each tender proposal must address the following key areas:

C1 Company overview and Previous Experience: The tenderer should provide a detailed overview of their suitability to undertake this contract and provide two examples (including references) of similar contracts successfully undertaken in the previous three years.

C2 Approach to Delivery: The tenderer should provide a detailed implementation plan illustrating the key milestones and timescales in relation to delivery within the required timeframes and including any necessary training and support.

C3 Functional and Non-Functional requirements: The supplier should outline how functional and non-functional requirements will be met.

Responses must be limited to a maximum **20 pages using Arial Size 12** for both components above. Any information which exceeds this limit will not be considered.

Quantitative Criteria

Tenderers are required to complete the pricing schedule (Annex I). Prices must be in GBP and be exclusive of VAT. Prices must only be submitted using the pricing schedule provided.

Pricing Schedule

The schedule below must be completed and submitted as part of this Tender.

Tenderers must complete the Pricing Schedule in full, failure to complete may result in elimination from the competition.

Tenderers MUST NOT seek to provide an alternative pricing model.

All rates must be exclusive of VAT and **remain fixed for the period of this contract**.

All costs must be included. Any cost not included within the tender response cannot be included at a later date.

The pricing schedule should be signed by the person who has endorsed this tender proposal.

Pricing Schedule

For the purposes of analysis of the financial component of the bid, please provide your **costing by module** in one of the following three options:
Option 1: an upfront fee and an annual fee. (If there is only an annual fee, then mark 0 in the column for upfront fee.)
Option 2: an upfront fee and an annual cost per user.
Option 3: an annual user fee only.

There are three tables - the first is based on current staffing levels (240), the second for less than 200 staff and the third from more than 300 staff.

Module*	Based on 240 staff					Comments
	Option 1		Option 2		Option 3	
	Upfront fee	Annual fee	Upfront fee	Cost per user	Cost per user	
1. Recruitment						
2. Onboarding						
3. Contract management						
4. Leave						
5. Learning & development						
6. Performance reviews						
7. Disciplinary						
8. Termination						
9. Employee Self Service						
10. Salaries						
11. Payroll						
12. Report generator						
13. Other please specify						
Charity discount						
Discount for multiple modules						

Indicate in the comments section if a module is not priced separately but is included in the cost of another module.

Module*	Based on less than 200 staff					Comments
	Option 1		Option 2		Option 3	
	Upfront fee	Annual fee	Upfront fee	Cost per user	Cost per user	
1. Recruitment						
2. Onboarding						
3. Contract management						
4. Leave						
5. Learning & development						
6. Performance reviews						
7. Disciplinary						
8. Termination						
9. Employee Self Service						
10. Salaries						
11. Payroll						
12. Report generator						
13. Other please specify						
Charity discount						
Discount for multiple modules						

*Indicate in the comments section if a module is not priced separately but is included in the cost of another module.

| Module* | Based on more than 300 staff | | | | | Comments |
| | Option 1 | | Option 2 | | Option 3 | |
	Upfront fee	Annual fee	Upfront fee	Cost per user	Cost per user	
1. Recruitment						
2. Onboarding						
3. Contract management						
4. Leave						
5. Learning & development						
6. Performance reviews						
7. Disciplinary						
8. Termination						
9. Employee Self Service						
10. Salaries						
11. Payroll						
12. Report generator						
13. Other please specify						
Charity discount						
Discount for multiple modules						

Indicate in the comments section if a module is not priced separately but is included in the cost of another module.

Company Name: _____   **Date:** _____

Signature: _____   **Contact number:** _____

Name (Block Capitals): _____   **Email address:** _____