



REQUEST FOR PROPOSALS

**Professional Employer Organization (PEO) Services
Or
Administrative Services Organization (ASO)
And
Human Resource Information Systems (HRIS)**

Date of issuance: August 15, 2023

Pre-Proposal Meeting: September 1- September 15, 2023

Submission Deadline: October 15, 2023

**Issued by:
Top Shelf Collective
Jackson, Wyoming**

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SECTION 1 - INTRODUCTION

Top Shelf Collective is a network of for-profit local businesses consisting of The Liquor Store of Jackson Hole Inc., Jackson Hole Marketplace LLC., and The Vault of Jackson Hole LLC.

Our Values

We aim to practice gracious authenticity, which allows people to make mistakes so that they can develop as both teachers and learners. We Celebrate wins, knowledge failures. We all own it, we all grow from it, we all accelerate from it, and we are all rewarded for it.

Our Employees

Collectively, we have around 50 employees with some being employed with us for over 20 years all the way to seasonal employees who will stay with us for a few months. We employ people from multiple states. Some who work in other states and work on site in Wyoming, and some who work remotely.

SECTION 2- GENERAL INFORMATION

2.1. Purpose

The purpose of the Request for Proposal (“RFP”) is to invite potential vendors (the “Proposer”) to submit a proposal for Professional Employer Organization (PEO)/Human Resource Information System (HRIS) services for Top Shelf Collective. An evaluation team for this RFP will review the proposals received in response to this RFP and the winning proposal will be chosen.

We are looking for a long-term relationship that can help us grow. We want to offer fortune 500 company benefits and resources as a small business.

These documents constitute the complete set of specifications, requirements, and/or proposal forms. All terms and conditions in this RFP, and addenda, proposer's submissions and negotiated terms, are incorporated into the contract by reference.

2.2 Procurement Standards

This RFP provides a uniform method for the procurement of specified services, allowing for full and open competition. It contains the necessary background, requirements, technical specifications, information, and instructions for responding to the RFP. Selection and consideration will be based upon demonstrated competence and qualifications to perform requested services; and a fair and reasonable price. Top Shelf Collective’s intent is to execute a contract for a single proposer.

2.3 Schedule

The following schedule is subject to change.

Activities	Date
Issuance of RFP	August 15, 2023
Pre-Proposal Meeting (Questions & Answers)	September 1 – September 15, 2023
Proposals Due	October 25, 2023
Interviews (optional)	October 25 – November 5, 2023
Analyzation period	November 5 – November 15, 2023
Final recommendation	December 1, 2023
Contract Anticipated Start Date	January 1, 2024

2.4 Issuance and Availability of RFP

This RFP is issued Tuesday, August 15, 2023, 5:00pm (MT). A pre-proposal meeting where interested parties may ask questions or discuss our requirements further may request a

meeting time anytime between September 1 and September 15, 2023, by emailing hrrfp@wineliquorbeer.com

2.5 Response Deadline

The deadline to submit a proposal via email to hrrfp@wineliquorbeer.com is no later than 5:00 p.m. (MST) on Friday, October 25, 2023. Proposals received after that time will not be accepted.

2.6 Type of Contract

Top Shelf Collective intends to negotiate and execute a contract as a result of this RFP. Top Shelf Collective reserves the right to vary or change the terms of any contract resulting from this RFP, including funding levels, scope of work, performance measures, adding other related programs or services.

2.7 Contract Period

It is the intent of Top Shelf Collective to execute a single contract for Professional Employer Organization (PEO)/Human Resource Information System (HRIS) services. The duration of the contract shall be for a period of one year from the date of execution of the agreement. Top Shelf Collective may opt to extend the term of the contract for up to one year thereafter on an annual basis. Top Shelf Collective reserves the right to terminate a contract at any time based on the Contractor performance or matters of noncompliance.

2.8 Eligible Contractor

The proposer must have the necessary technical competence, skills and professional judgement to accomplish the work solicited in the RFP. Proposer must be experienced with our requirements of a software system and must be legally authorized to provide the services mentioned in Wyoming. The contractor may not assign, transfer or otherwise dispose of any portion of a contract in whole or in part to any third party, without the prior written approval of Top Shelf Collective.

2.9 Conditions of Bid

1. All proposals submitted in response to this RFP will become the exclusive property of Top Shelf Collective.

2. Proposal, if accepted, will become the basis for the contract scope of work.
3. This RFP is not to be construed as a purchase agreement or contract or as a commitment of any kind; nor does it commit Top Shelf Collective to pay for any costs incurred in the preparation of the proposal or any other costs incurred prior to execution of a formal contract, unless such costs are specifically authorized.
4. Top Shelf Collective reserves the right to accept or reject any or all proposals received, to cancel and/or reissue this RPF in part or its entirety.
5. This is a negotiation procurement utilizing the RFP method, and as such, the selection and award of a contract does not have to be made to the respondent to the lowest priced/cost offer, but rather to a respondent submitting the most responsive proposal that satisfies the requirements therein.
6. Top Shelf Collective reserves the right to request additional information, clarification or explanation of any aspects of a proposal submitted in response to this RFP.
7. Top Shelf Collective reserves the right to negotiate the final terms of any and all contracts or agreements with selected proposers. Any contract terms negotiated as a result of this RFP may be renegotiated and/or amended in order to meet the needs of Top Shelf Collective.
8. Top Shelf Collective reserves the right to contact any individuals, agency, employer, or grantee listed in a proposal, or to contact others who may have experience or knowledge of the proposer's relevant performance and/or qualifications; and to request additional information from any and all respondents to this RFP.
9. Any misrepresentation of the bidder's ability to perform as stated in the proposal may result in the disqualification of the proposer or the cancellation of any contract awarded as a result of this RFP.
10. Top Shelf Collective reserves the right to impose additional requirements and refinements to the terms and conditions, scope of work, performance measures, and funding amounts or sources during the course of any contract resulting from this RFP.
11. Respondents shall not engage in any activity which would result in or eliminate competition under this procurement. Violations of this provision may cause the bidder to be disqualified.
12. All proposals submitted must be an original work product of the proposing entity.
13. The contents of a successful proposal may become a contractual obligation and be incorporated by reference into a contract. Respondents must intend to fulfill all the representations in their proposal. Failure of a respondent to accept this obligation may result in the cancellation of an award or contract.
14. Top shelf Collective reserves the right to deem as non-responsive or to disqualify any proposal that, in its sole discretion, does not comply with or conform to the terms, conditions, specifications, and/or requirements contained in this RFP.

2.10 Minimum Standards for Review

1. Be received by the deadline
2. Provide a one-page description that breaks down each cost and fee quoted.
3. Submit evidence by submitting a brief written narrative addressing each of the following points:
 - a. Proposer must be licensed in the State of Wyoming to perform such services.
 - b. Proposer must allow for clients to have insurance plans outside their master group plans.
 - c. Proposer must be web-enabled, fully automated, with a fully integrated HRIS system.
 - d. Proposer must be capable of performing full administration of all benefit plans. This means full administration on plans sponsored by those not sponsored by the PEO. Invoices for all benefit plans, client sponsored, and non-client sponsored, must be reconciled and paid by the PEO directly to the insurance company.
 - e. Proposer must maintain a master group single employer Health Insurance Benefit Plan with multiple (3 or more) different plans offered.

2.11 Evaluation Criteria

All proposals will be evaluated by a review committee in accordance with the criteria listed below.

Service Design:

Service Design considers availability, accessibility, type, and quality of services and approaches offered in support of the goals and objectives listed in this RFP.

Demonstration Effectiveness:

Demonstrated Effectiveness refers to the proposer's experience capabilities in providing PEO services, and the customer satisfaction of current or previous clients. Financial stability will also be considered as part of these criteria.

Cost Reasonableness:

Cost Reasonableness will be determined by relating the proposed cost to proposed services vs. Current cost of those services.

- a. Current and past performance of your organization's experience with administrative matters such as payroll, hiring, on-boarding, administration of benefits, and risk management services.
- b. Credentials and experience of the PEO's administrative, human resource, and risk management staff and indicate the average staff tenure and turnover with the organization.

- c. Workers' Compensation Certification Program evidencing that the PEO's risk management program is meeting proven insurance industry risk management best practices.
- d. The number of years the PEO has been in business indicates if the PEO is legally able to work in Wyoming. Indicate your Federal Employer Identification Number.
- e. Identify how the employee benefits are funded, indicating if they are fully insured or partially self-funded. Who the third-party administrator(s) or carrier(s) are and provide written evidence of the financial viability of these organizations.
- f. Indicate if the PEO offers a Client Defense Program and up to what dollar amount will the PEO pay for legal fees for the defense of qualified employee lawsuits.
- g. Professional and client references, including bank and credit references. The PEO shall demonstrate that payroll taxes and insurance premiums have been paid consistently and timely.
- h. Membership and in Employer Services Assurance Corporation or provide information allowing Top Shelf Collective to assure that its employees and employment taxes will be paid, and benefit payments will be assured in the event of payment default by the PEO.

2.12 Administrative Requirements

1. Top Shelf Collective will provide any training and/or technical assistance needed by the selected contractor regarding company policies, documents, procedures, etc. That are specific to Top Shelf Collective.
2. Employees of the contractor are subject to the exclusive control and supervision of the contractor. The contractor is solely responsible for personnel matters including hiring, discipline, termination, supervision, criminal background checks, training, evaluation, etc. For its employees.
3. Proof of insurance is not a requirement for submission of a proposal, but the selected proposer will be required to obtain and provide proof of all insurance specified in this RFP and provide Top Shelf Collective with proper certificates or policies prior to commencing work under a contract resulting from this RFP. Top Shelf Collective must be listed as an additional insured on the Certificate of Insurance. Policies must remain in full force for the duration of a contract. Any changes in insurer, coverage, deductibles, modifications, alterations, or cancellations of coverage during the term of contract must be immediately communicated to Top Shelf Collective. The following insurance/bonds are required:
 - a. General Liability- Contractor must carry general liability insurance coverage sufficient to cover any liability that may arise from the performance of a contract

resulting from this RFP. The contractor must be able to cover the cost of any deductible.

- b. Errors and Omissions – Contractor must, at its own expense, must carry “errors and omissions” insurance or the equivalent. Contract funds cannot be used to pay for Errors and Omissions insurance.
 - c. Workers’ Compensation – Contractor must ensure that all employees are covered by workers’ compensation insurance. If self-insured, the contractor must warrant that it will maintain coverage sufficient to cover any liability that may arise from performance under a contract resulting from this RFP.
4. Contractor, including all its employees, must comply with all Information Technology access and user policies and requirements of Top Shelf Collective.

2.13 Organizational capacity

Proposers must demonstrate that they have the organizational capacity to provide a service in accordance with the requirements in this RFP. Top Shelf Collective reserves the right to conduct a pre-award survey of the selected proposer to determine the capacity of the proposer’s organization to provide services, meet administrative requirements, and maintain an adequate financial system. Top Shelf Collective also reserves the right to deny a contract to any selected proposer that does not make timely changes required by Top Shelf Collective, as a result of a pre-award survey, to bring its systems into compliance.

SECTION 3 - DESCRIPTION OF SERVICES/SCOPE OF WORK

Top Shelf Collective is seeking responses from qualified Professional Employer Organizations (PEOs) who can demonstrate evidence of past performance and business endeavors that align with the purpose, values, and vision to provide exemplary cost-effective human resource service solutions and manage employee risk. Provide benefits, payroll processing, and serve as the employer of record for Top Shelf Collective.

The following are the services to be provided by a qualified Professional Employer Organization (PEO) for approximately 48 employees receiving payroll every two (2) weeks made through electronic deposit.

3.1 Human Resource Management

Provide a detailed description of human resource management services to include:

- a. Personnel Consultation and Assistance (Recruiting, Hiring, On Boarding, Separation of Employment, Discipline, and termination).
- b. Unemployment Claims Handling

- c. Consultation/assistance with Compliance with Employment Laws and Regulations (Americans with Disabilities Act, FMLA, harassment, legal issues etc.)
- d. Employee Background Checks.
- e. Availability and types of professional development training (staff and managerial).
- f. Provide a description of the capabilities of your HRIS system, address system integration, reporting, tools, reporting formats, ability to download reports.
- g. Describe Time and attendance systems, vacation and sick pay tracking, ability to integrate with payroll and communicate balances to employees.

3.2 Provide a description of payroll services offered

- a. Report Hours
- b. Computation and Preparation of Payroll
- c. Payment methods available
- d. Cloud-based timecard system with payroll register
- e. Job cost information downloadable to CVS (Comma Delimited), EXEL, and payroll detail unloadable to payroll system.
- f. Direct Deposit
- g. Deductions for Child Support, Levies, Garnishments and any other deductions required by law
- h. PTO request processing
- i. Payroll register review before processing available
- j. Employee expense reimbursement (e.g., mileage)
- k. Withhold income Taxes and FICA
- l. Complete Quarterly Tax Filing
- m. Complete W-4, I-9s, and W-2s
- n. Payroll assistance
- o. Employer verification
- p. Employee Earnings Records
- q. Standard Reports list
- r. Customized reporting of payroll costs
- s. Payroll input methods (phone, internet, etc.), including process and timelines
- t. Filing/Reporting (new hire, W2, W4, FICA, etc.) to local, state, and federal agencies
- u. Workers' Compensation

3.3. Provide a description of benefits offered matching (or providing comparable) current benefits:

- a. Procuring and administering employee benefit plans
- b. Enrolling employees in all benefit plans
- c. Responding to employee benefit inquiries, claims, and complaints
- d. Health Insurance
- e. Dental Insurance

- f. Vision Care
- g. Group Life and Accident Death & Dismemberment
- h. Disability Insurance (Short Term, Long Term)
- i. Prescription Card
- j. HSA plan
- k. Track Eligibility Dates for Benefits Conduct online enrollments
- l. Assume COBRA, HIPPA, ERISA compliance
- m. Employee Assistance Program
- n. Availability of Ancillary Benefits (including but not limited to Life Insurance, Disability Insurance, Critical Illness Insurance, Accident Insurance, Hospital Indemnity Insurance)
- o. Availability or retirement plans (401k, pension plans, etc.)
- p. Flexible Spending Account Plan

3.4 Online Services

- a. Time and Attendance
- b. On-off boarding
- c. HRIS custom fields
- d. Employee Portal, handbook, training documents, handbook, forms, etc.
- e. Access- reporting, data change requests, new hire enrollment and payroll entry
- f. Online yearly benefits enrollment
- g. Online access for employees to change/update their personal information easily and 24/7
- h. iPhone or Android app available
- i. Helpdesk availability

SECTION 4 - BUDGET INFORMATION

4.1 Fees/Charges

A PEO proposal should include the services offered and provide an explanation of the Proposer's price breakdown for services to be performed. The proposal should include the employer's cost of FICA taxes, and Federal Unemployment Tax (FUTA). Develop and submit a line-item budget for all services to be provided based upon information provided in this RFP, and anticipated fees. Itemize all applicable fees, detailing all elements including your company's fee for services for the following:

- i. Calculate the total salary and applicable fees for the initial payroll, including salaries, fringe benefits, service fees, and all start up fees/costs.
- ii. Calculate the total salary and applicable fees for subsequent routine payrolls, including salaries, fringe benefits, service fees.

Provide a complete list of all fees, combined rates for services provided, and provide an annual estimate for all fees based on the estimated annual number of 48 employees for 26 payroll cycles.

Proposers may propose an annual escalation in prices but must keep in mind that the competitiveness of prices will be part of the evaluation criteria.

Insurance Benefit Cost

Provide the following cost in your budget:

1. Carriers of life/AD&D Insurance and cost per employee per month
 - a. Company Provided
 - b. Voluntary
2. Carriers of Short and Long-term disability Insurance and cost per employee per month
 - a. Company Provided
 - b. Voluntary
3. Carriers and Cost of Dental Plans per employee per month
4. Carriers and Cost of Vision Plans per employee per month
5. Carriers and Cost of Medical Plans per employee per month
 - a. Provide cost per employee per month
6. Ability for WSA Supplement to offset Medical, Dental, and Vision
7. Guaranteed for how long?

Additionally, provide a sample of invoices, itemizing applicable cost and fees to including the following:

Employer Taxes:

- i. Social Security
- ii. Medicare
- iii. Federal Unemployment
- iv. State Unemployment

SECTION 5 – CURRENT BENEFITS AND OTHER RELEVANT INFORMATION

5.1 Relevant Information

- Multiple Locations
- Number of employees: 50
- Annual payroll: \$1.4 million
- Bi-weekly pay cycle
- Current use of multiple PEO/HRIS providers with a goal to consolidating to one (1)
 - BambooHR – applicant tracking, onboarding, training and record keeping
 - Helpside – benefit, PTO & payroll management,

- Planday – scheduling management, time and attendance
- In business for 38 years
- Current employee handbook and job descriptions- yes

5.2 Medical Insurance

Top Shelf Collective desires to be a part of a Single Employer Group Master Plan offered via the PEO if Favorable to its employees.

5.3 Other Current Benefits

- Dental Insurance – Delta Dental, PEO sponsored
- Vision Insurance -
- Basic Group Life -
- Accidental Death and

5.4 Retirement Plan

401(k) Savings Plan offered after 6 months of service. It is a Safe Harbor Plan and the company contributes 100% of employee contributions, dollar for dollar, up to 3% of eligible pay, plus 50% of each additional dollar greater than 3% and no more than 5% of eligible pay.

5.5 Other Voluntary Benefit Plans

Selected PEO may elect to offer additional voluntary benefit plans, such as:

- Pre-paid Legal Services Plan
- Cancer Benefit Plan
- Long Term Care Insurance
- Employee Assistance Program

SECTION 6 – PROPOSAL PREPARATION AND SUBMISSION

6.1. General Instructions for Submitting a Proposal

In response to this RFP, each Proposer should review and account for all the requirements contained within this RFP. The Respondent's reply must be submitted via email to the authorized contact persons:

Emilee Ballard
Director of Support Services
Email: hrrfp@wineliquorbeer.com
Phone: 435-764-1466

6.2. Proposal Outline

Proposal text should follow the sections outlined as found below:

Title Page

The title page must include, at a minimum:

The title of the RFP;

The RFP due date;

The Proposer's name (person, organization and firm);

The name, title, phone number and address of the person who can respond to inquiries regarding the reply;

The signature of the Proposer with authorized signatory;

And the FEID/FEIN of Proposer.

Table of Contents

Include a clear identification of the material included in the proposal by section and page number.

Executive Overview

Understanding of Scope of Services

Responses must include information showing the Proposer's understanding of the needs specified in this RFP and must include a positive commitment to perform the work within the specified time.

Company Qualifications

Describe the Proposer's experience in performing services as specifically represented in this solicitation. Proposer should provide detailed evidence that the Proposer's firm has previous experience with engagements of similar scope and range as the engagement specified in this RFP. Give the location of the office from which the work is to be done and the number of services offered by the Proposer and indicate the length of time that the Proposer has provided the services described above.

Engagement Planning, Execution, and Transition

The Proposer must submit a comprehensive description of their engagement work plan(s) as part of their reply. The plans may include narrative, work programs, tables, or other illustrative disclosures that demonstrate aptitude for management and completion of this engagement. Include a detailed description of the transition process moving from our current PEO/HRIS system to the Proposer's system.

6.3. Attachments

Replies to this RFP must include the following documents and certifications:

1. Addendum A: Proposer Identification Form (Attachment 1). A representative who is authorized to contractually bind the Proposer must complete, sign and attach this form.
2. Addendum B: Reference Form (Attachment 2). A representative who is authorized to contractually bind and Proposer must complete, sign and attach this form.
3. Addendum C: Certification of Legal and Signatory Authority (Attachment 3). Completed, signed, and attached by authorized Individual for Proposer.
4. Addendum D: System Survey/Consideration items (Attachment 4). Complete with yes/no answers.
5. Addendum E: List of Subcontractor(s) (Attachment 5). Attach a list of subcontractors who will perform work on this engagement under your organization's direction and supervision. Form should be completed, signed and attached by authorized individuals for Proposer.
6. W9 Form (Attachment 6). Complete and submit a W9 form for your organization.
7. Price Reply (Attachment 7). All potential fees and charges related to the performance of contracted services should be identified. Fees and charges identified will be incorporated into the contract. A representative who is authorized to contractually bind the Proposer must complete, sign, and submit this form.
8. Certifications (Attachment 8).

6.4 Additional Information

Please provide any additional information you consider to be helpful in the selection process.

6.5 Reply Submission

Proposers shall submit all data in the formats specified in this RFP. The forms furnished must be used when submitting the reply. Forms are to be filled out with pen or typewritten with alterations, changes or amendments initialed.

REPLIES MUST BE RECEIVED ON OR BEFORE THE DUE DATE reflected on the timeline in the Schedule of Events of this RFP. It is the Proposer's responsibility to assure its reply submittal is delivered at the proper email as required by this RFP. Late replies will not be accepted. Proposers should not include marketing materials in their RFP submission. Proposer's replies must state that its reply constitutes an offer that remains valid for at least 120 days after receipt or the reply.

Proposals may be withdrawn upon written request made before the response deadline. The cost of submission or returning proposals that are withdrawn shall be the responsibility of the proposer. Once the response deadline is passed, all proposals will become the property of Top Shelf Collective.

6.6 Inquiries

Any questions must be sent via email hrrfp@wineliquorbeer.com

Addendum A
PROPOSER IDENTIFICATION FORM

LOGAL NAME OF ORGANIZATION: _____

HEAD OF ORGANIZATION: _____

MAILING ADDRESS: _____

PHYSICAL ADDRESS (IF DIFFERENT): _____

PHONE NUMBER: _____

EMAIL: _____

PROPOSAL CONTACT PERSON: _____

TITLE: _____

AGREEMENT SIGNATORY AUTHORITY () CORPORATION () SOLE OWNERSHIP
TAX/LEGAL STATUS () PARTNERSHIP () OTHER

DATE ESTABLISHED: _____

FEDERAL TAXPAYER ID NUMBER: _____

AUTHORIZATION FOR SUBMISSION

TYPED NAME & TITLE OF AUTHORIZED SIGNATORY

SIGNATURE & DATE

Addendum B

REFERENCE FORM

Top Shelf Collective is interested in the Proposer's reputation for providing PEO services. Please list at least 3 references of current or past contracts that are similar in scope or scale and provide Company/City name, contact and additional information. Attach additional pages if necessary.

COMPANY NAME:
COMPANY ADDRESS:
NAME OF AUTHORIZED REPRESENTATIVE:
REPRESENTATIVE EMAIL:
TELEPHONE:
TYPES OF SERVICES PERFORMED:
YEARS OF SERVICE:

COMPANY NAME:
COMPANY ADDRESS:
NAME OF AUTHORIZED REPRESENTATIVE:
REPRESENTATIVE EMAIL:
TELEPHONE:
TYPES OF SERVICES PERFORMED:
YEARS OF SERVICE:

COMPANY NAME:
COMPANY ADDRESS:
NAME OF AUTHORIZED REPRESENTATIVE:
REPRESENTATIVE EMAIL:
TELEPHONE:
TYPES OF SERVICES PERFORMED:
YEARS OF SERVICE:

Addendum C

CERTIFICATION OF LEGAL AND SIGNATORY AUTHORITY

I, _____ (name) certify that I am the _____
_____ (title) of the eligible entity name as bidder and
respondent herein, and I am legally authorized to sign and submit this proposal to Top Shelf
Collective on behalf of said organization by authority of its governing body.

I certify that _____ (name) who signed the coversheet of this proposal has
the legal authority to enter into and execute a contract with Top Shelf Collective to provide
services and activities authorized and detailed in this proposal. I agree to submit upon request
by Top Shelf Collective such information and documentation as may be necessary to verify the
certification contained herein.

I further certify that the information contained in this proposal and all attachments is true and
correct. I certify that no officer, employee, board member, or authorized agent of Top Shelf
Collective has assisted in the preparation of this proposal. I acknowledge that I have read and
understand the requirements and provisions of the RFP and that this organization will comply
with all applicable federal, state, and local laws, rules, regulations, policies and directives in the
implementation of this proposal. I certify that I have read and understand the governing
provisions, limitations and administrative requirements of this RFP and will comply with all
terms and conditions.

Name of Individual or Organization submitting application:

Name and Title of Authorized Signatory:

Signature of Authorized Representative:

Date:

Addendum D

SYSTEM SURVEY/CONSIDERATION ITEMS

The following consideration items have been given a point value of importance with 5 being highly important and 1 being of less importance. The information submitted should contain sufficient information to demonstrate your organization's capability in the area surveyed. Additional information may be requested.

CONSIDERATION ITEMS	OFFERED? Circle	POINT VALUE
<u>Accessibility</u>		
• Custom access levels for various user roles	Yes No	5
• Ability to switch from one user account to another	Yes No	
• iPhone or Android app	Yes No	3
• Scheduling software and payroll and benefits is fully integrated with single sign on for all users	Yes No	5
• Payroll and scheduling software integrate with QBO	Yes No	5
• Is there an open API with the payroll and scheduling software to integrate with MS Power BI	Yes No	3
Total Point Value		21
<u>Benefits</u>		
• Offers benefit options where employees can choose the plan as well as opt in or out of each plan (ei, medical, dental, vision, accident, disability, mental health)	Yes No	5
• 401k option	Yes No	5
• Financial planning education and information services and resources	Yes No	3
• Automatically provides benefit census every year	Yes No	3
• PTO - Manage based on our policies and be automated based on our policies to avoid errors	Yes No	4
Total Point Value		20
<u>Documentation</u>		
• Upload and store documents in employee files - the ability to integrate current HR documents for current and past employees	Yes No	5
• Ability for employees to digitally sign documents	Yes No	5
Total Point Value		10
<u>Employee Management</u>		
• Ability to mass text employees- or other mass communication ability	Yes No	3
• Ability to survey employees so it is kept confidential eNPS survey	Yes No	1
• Ability to input pay raises/change labor codes on our end	Yes No	5
• Does the company pay/communicate with Wyoming Department of Employment for Unemployment Claims?	Yes No	1

• Ability for managers to adjust/edit punch in times, ability to manage multiple locations at the time of clock in, ie: TLS or Marketplace	Yes No	5
• Ability to manage and assign performance reviews and retain the documents in employee files	Yes No	3
Total Point Value		18
<u>Financial</u>		
• Ability to specify labor allocation percentages for individual employees (e.g 60% labor = JHMP & 40% labor-TLS)	Yes No	4
• Handle multiple business (with different EINS) in payroll - paycheck comes from one entity. Shared labor across entities.	Yes No	4
• Ability to run payroll	Yes No	5
• Run financial models for budgeting and forecasting with scheduling to see impacts of payroll on budget		5
Total Point Value		18
<u>Hiring</u>		
• Manage job postings & share with online job posting platforms	Yes No	5
• Application gathering/filtering/tracking system	Yes No	5
• Filter applicants - hired/not hired & why	Yes No	5
• Ability to make notes regarding applicants	Yes No	4
Total Point Value		19
<u>Onboarding/Offboarding</u>		
• Ability to keep track of and check off tasks assigned related to offboarding	Yes No	5
• Ability to customize and easily assign onboarding tasks for specific employees/managers	Yes No	5
• Fully automated, non-manual process	Yes No	4
Total Point Value		14
<u>Reporting</u>		
• Ability to customize financial reports: Allocation report, Journal Entry Report, PTO balances with costs, new hires, terminations, benefits billing, deduction reports, end of month accrual reports, costs associated with scheduling, workers comp estimate, comparisons to budget (if possible, that last one is just a wish)	Yes No	5
• Be able to easily pull training/onboarding reports to keep track of employee progress and identify if anyone is missing any documentation	Yes No	5
• Ability to create custom reports by having all information within the employee file as an option to be included in the report	Yes No	5
Total Point Value		15
<u>Scheduling</u>		
• Ability to clock in either off site or on site with limits by role of who can use the remote clock in ability function	Yes No	5

• Ability to cost out schedule, just for managers to compare schedule to budget add in payroll to revenue costs by day potentially hour	Yes	No	5
Total Point Value			10
Training			
• Be able to upload tasks/compliance documents that require signatures	Yes	No	5
• Offer online training modules for personal and professional development	Yes	No	5
Total Point Value			10
MAX POSSIBLE POINTS			155

Addendum E

LIST OF SUBCONTRACTORS

Each Proposer shall submit with their response a list of the subcontractors who will perform work under the contract(s), as a result of this RFP. The Proposer shall have determined to their own complete satisfaction that a listed subcontractor has been successfully engaged in providing services with specific proven experience in the area(s) indicated in the RFP. The successful Proposer and their subcontractor must utilize professional judgement and expertise to conduct services. In the event that no subcontractor will be used, this form shall be returned indicating, "No subcontractor will be used."

NO SUBCONTRACTOR WILL BE USED () _____
Signature of Authorized Representative

Subcontractor Name:	
Business Type:	
Address: City: Zip:	
Phone:	
License #	

Subcontractor Name:	
Business Type:	
Address: City: Zip:	
Phone:	
License #	

Subcontractor Name:	
Business Type:	
Address: City: Zip:	
Phone:	
License #	

Name of Authorized Representative