



## **REQUEST FOR PROPOSALS (RFP)**

### **Payroll Processing Software and Related Services**

**Issued By:**  
LEADS, Inc.

**Issue Date: October 15, 2026**

**Proposals Due: November 16, 2026**

**Target Go-Live Date:** April 1, 2027, to coincide with the start of the agency's fiscal year. Vendors should indicate their ability to support this implementation date and identify any factors that would influence the recommended timeline, including data conversion, payroll parallel testing, employee training, and implementation readiness.

Please describe how payroll and tax data from January 1 through March 31, 2027, will be incorporated into the new system following implementation, including the migration of year-to-date payroll records, tax withholdings, employer tax contributions, and employee earnings information to ensure accurate reporting for the 2027 calendar year.

**CONTACT:**

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## **1. INVITATION TO PROPOSE**

LEADS, Inc. (LEADS) invites qualified vendors to submit proposals to provide a comprehensive cloud-based Payroll Processing system and related services.

LEADS is soliciting proposals for the implementation, software licensing, payroll processing, tax administration, technical support, ongoing HR support, and related professional services.

This procurement is being conducted in accordance with the procurement standards contained in 2 CFR Part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards) and all applicable federal and State of Ohio requirements.

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## 2. ORGANIZATIONAL BACKGROUND

Celebrating more than 60 years of service, LEADS, Inc. is a private nonprofit Community Action Agency headquartered in Newark, Ohio. LEADS serves thousands of households annually through a broad range of programs designed to alleviate the causes and conditions of poverty.

Programs include, but are not limited to:

- Head Start & Early Head Start
- Affordable Housing
- Weatherization Assistance Program/Home Repair/Home Accessibility
- Home Energy Assistance Program (HEAP) and related energy assistance programs
- Food pantries
- Community Services Block Grant

LEADS currently employs approximately **120 staff members**. The majority of employees are based in **Licking County**, serving locations in Buckeye Lake, Newark, Pataskala, and Utica, with additional staff located in **Marysville (Union County)** and **Delaware (Delaware County)**.

All LEADS employees, including **exempt/salaried and non-exempt/hourly staff**, are required to accurately track and report their time worked. Employees accrue leave under multiple leave policies based on position, classification, and date of hire. Depending on eligibility, employees may accrue **Paid Time Off (PTO)** or separate **annual leave, sick leave, and personal leave** balances. The payroll and timekeeping solution must be capable of supporting multiple leave accrual methodologies, tracking separate leave banks, and administering varying accrual rules across employee groups.

The agency seeks a modern, integrated platform capable of improving efficiency, compliance, reporting, and employee experience.

Currently, employees complete paper timesheets each biweekly pay period. These timesheets go through manual review and approval through the supervisory chain. Our fiscal team manual inputs timesheets and processes payroll internally. LEADS operates on a 34-hour, Monday-Thursday workweek.

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## 3. PROCUREMENT OBJECTIVES

The objectives of this procurement are to:

- Replace manual payroll processes with an integrated solution to improve accuracy and efficiency.
- Enhance compliance with federal and state employment laws.
- Improve recruitment and onboarding.
- Increase employee self-service capabilities.
- Provide robust reporting and analytics.
- Establish an ongoing strategic partnership with an experienced technology provider.

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## 4. SCOPE OF SERVICES

The successful proposer shall provide all software, implementation services, customer support, training, consulting, and professional services necessary.

At a minimum, the proposal shall include the following. Please indicate if any of these services are included, not available, or are available at an additional cost.

### **Payroll Processing**

- Payroll processing
- Payroll tax calculations
- Federal, State, and Local tax filings
- W-2 preparation and all required filings
- Tax calculations and filings related to life insurance over \$50,000
- Direct deposit
- Payroll adjustments
- Retroactive payroll
- Garnishment administration
- PTO accruals, including support for multiple PTO policies based on employee classification or role, including differing accrual rates, eligibility requirements, and applicable accrual limits.
- Multiple earnings/department codes
- Grant allocation capability
- Payroll reporting
- Year-end processing

### **Timekeeping & Scheduling**

- Timekeeping
- Leave management
- Supervisor approval workflows
- Overtime tracking/monitoring
- Timecard exception reporting

### **Employee Self-Service**

Employees should be able to:

- View payroll
- Access W-2s
- Update tax information
- Request paid leave
- View benefits
- Complete evaluations
- Access HR documents

## **Supervisor Self-Service**

Managers shall be able to:

- Approve payroll & leave requests
  - Manage schedules & monitor overtime
  - Complete evaluations
  - Access reports & view dashboards
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## **OPTIONAL MODULES**

Please indicate if any of these services are included in the proposal, not available, or are available at an additional cost.

### **Human Resources Information System**

- Electronic personnel files
- Position history
- Compensation history
- Organizational charts
- Document management
- Workflow automation
- Electronic forms
- Unemployment management
- Workers Compensation management
- I-9 processing
- 1099 administration

### **Recruiting & Applicant Tracking**

- Online employment applications
- Job postings
- Candidate communications
- Interview scheduling
- Hiring workflow
- EEOC reporting

### **Electronic Onboarding**

- Electronic offer letters
- New hire documentation
- Electronic signatures
- Policy acknowledgements
- Employee handbook acknowledgements
- New hire workflows

## **Benefits Administration Integration**

- Integrations with health, dental, vision, 403B retirement, life insurance, and long-term disability
- Open enrollment and employee benefit election processing
- Qualifying life event processing
- Carrier connectivity
- ACA reporting
- COBRA support

## **Performance Management**

- Performance evaluations
- Goal setting
- Performance documentation
- Employee development planning

## **HR Compliance Support**

Vendor shall provide access to qualified Human Resources professionals capable of advising LEADS on:

- I-9 compliance
  - FLSA
  - FMLA
  - ADA
  - COBRA
  - Employee relations
  - Wage & Hour compliance
  - Handbook development
  - Policy development
  - HR best practices
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## **Integrations**

The solution should integrate with:

- Grants Management Systems, Inc. (GMS) general ledger software
- Lincoln Financial, our 403(b) retirement provider
- Banking institutions (Park National Bank)
- Benefits carriers (LEADS has a January 1 health insurance renewal date, but we are currently with Medical Mutual and its subsidiaries for medical, dental, and vision)

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## Reporting & Analytics

Please describe reporting and analytics available. Possible reports include:

- Payroll reporting
- HR reporting
- ACA reporting
- EEOC reporting
- Workforce analytics
- Turnover reports
- Dashboard reporting
- Custom report creation
- Export to Excel, PDF, and CSV

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## 5. IMPLEMENTATION SERVICES

Vendor shall provide complete implementation services including:

- Project management
- Data conversion
- Payroll conversion
- Configuration
- Testing
- Parallel payroll
- Training
- Go-live support
- Post implementation support

Vendor should provide a detailed implementation schedule supporting an April 1, 2027 production launch.

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## 6. TECHNICAL REQUIREMENTS

The proposed solution shall:

- Be fully cloud hosted
- Include role-based security
- Support multi-factor authentication
- Maintain audit logs
- Support mobile devices
- Operate within current web browsers
- Maintain a minimum uptime of 99.9%

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## 7. SECURITY REQUIREMENTS

Vendor shall describe:

- Disaster recovery
- Business continuity
- Encryption standards
- Data ownership
- Data retention
- Penetration testing
- Incident response procedures

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## 8. CUSTOMER SUPPORT

Vendor shall describe:

- Customer support hours
- Dedicated account manager
- Help desk availability
- Escalation procedures
- Training resources
- Knowledge base
- Software release schedule

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## 9. VENDOR QUALIFICATIONS

Proposals shall include:

- Company history
- Financial stability
- Years providing payroll services
- Number of nonprofit clients
- Number of Community Action Agency clients
- Number of Head Start clients
- Three comparable client references

Preference may be given to vendors with demonstrated experience supporting federally funded nonprofit organizations.

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## 10. COST PROPOSAL

The pricing proposal shall separately identify, if applicable:

- Software licensing
- Payroll processing
- Implementation \ Data conversion
- Annual maintenance
- HR support
- Optional modules
- Training
- Travel expenses
- Other recurring fees

No hidden fees shall be permitted. LEADS is tax exempt.

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## 12. EVALUATION CRITERIA

An evaluation committee will independently score proposals using the following weighted criteria.

| <b>Evaluation Category</b> | <b>Max Score</b> |
|----------------------------|------------------|
| Functionality              | 30 points        |
| Vendor's Experience        | 15 points        |
| Implementation Plan        | 15 points        |
| Customer Service & Support | 10 points        |
| Security                   | 10 points        |
| Cost                       | 20 points        |

Finalists may be invited to conduct demonstrations and answer questions from the evaluation team.

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## 13. FEDERAL PROCUREMENT REQUIREMENTS

This procurement is funded, in whole or in part, through federal financial assistance. The selected vendor must comply with all applicable federal requirements, including, but not limited to:

- 2 CFR Part 200 (Uniform Guidance)
- Equal Employment Opportunity requirements
- Debarment and Suspension certification
- Drug-Free Workplace requirements
- Lobbying certification, if applicable
- Confidentiality and data security requirements
- All applicable federal and State of Ohio labor laws

LEADS reserves the right to request additional certifications before contract is awarded.

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#### **14. GENERAL CONDITIONS**

LEADS reserves the right to:

- Reject any or all proposals.
  - Waive informalities or minor irregularities.
  - Request clarification of any proposal.
  - Negotiate with one or more vendors.
  - Conduct interviews or product demonstrations.
  - Verify references.
  - Award a contract in whole or in part.
  - Cancel this solicitation at any time if determined to be in the best interest of LEADS.
  - Any resulting contract will be contingent upon the availability of funds.
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#### **15. PROPOSAL SUBMISSION**

Proposals shall be submitted electronically to Nathan Keirns, President & CEO, at [nkeirns@leadscaa.org](mailto:nkeirns@leadscaa.org) in PDF format by the deadline established in this RFP.

Late submissions will not be accepted.

Questions concerning this solicitation shall be submitted in writing to Nathan Keirns as well.

LEADS appreciates your interest and looks forward to reviewing your proposal.