

Request for Proposal

Summary for Benefits/Payroll Scope of Work

Role:	Benefits & Payroll Contract Consultant	Status:	1099 Contractor, Full-time Basis
Department:	Human Resources Delivery	Term:	1 year Renewable Contract
Division:	Headquarters, Dallas, TX	Supervises:	No

Corporate Overview

Pursuit of Excellence is a Dallas-based Human Resources outsourcing and consulting company offering comprehensive HR services delivering H.O.P.E. to clients locally, nationally and internationally since 1994.

We are currently searching for a valued team-member to join the team on a 1099 contractor basis providing benefit and payroll services. Interested parties should submit a response to this RFP to include their resume, references and cost per project component.

Contract Consultants are required to:

- Adhere to policies per contract requirements (including POE and Client policies)
- Support 7 – 10 clients
- Provide detailed weekly, monthly and quarterly reports illustrating progress and achievement of deliverables outlined in the Statement of Work
- Provide on-premise support in the Dallas headquarters office, Monday – Friday, 8:00 am – 5:30 pm
- Submit timely invoices for payment
- Comply with additional requirements contained in an official Statement of Work and Consulting Services Agreement.

The statements on this Summary Scope of Work are intended to describe the general nature, level of work and expectations.

1. BENEFITS SOLUTION DESIGN, OUTSOURCING SERVICE DELIVERY AND CONSULTING

- Maintain a complete understanding of all company benefits, company policies and procedures as well as a working knowledge of applicable Federal and State Laws.
- Provide assistance for due diligence and benefit integration for acquisitions.
- Maintain in-depth knowledge and expertise in employee benefits, make recommendations on pending legislative actions regarding benefits and conduct benefits research.
- Respond to escalated employee or client level benefit issues / questions.
- Perform pay period and monthly reconciliations between premium rates, premiums for elected benefits, actual deducted premiums, carrier invoice charges, changes from hiring, terminations, COBRA elections, QLEs, etc.
- Identify necessary changes to business process to ensure efficient and accurate workflow and the best utilization of system capabilities in order to fit the company's business needs.
- Assist with the evaluation, recommendation and implementation of benefit programs through research and analysis of benefit trends for potential changes improvements and enhancements of current programs.
- Serve as a day-to-day contact for external benefit clients and benefit vendors, as requested.
- Provide subject matter expertise to benefit team to cultivate friendly, accurate and efficient customer service to internal and external clients.
- Oversee and manage the quality and accuracy of monthly benefit and client invoice processing.
- Support new hire and annual benefit orientation meetings.
- Assist HR Director and Marketing / Sales with RFP responses.
- Develop and provide reporting on weekly, monthly, quarterly, or as needed basis as requested by management.

- Research and development of complex employee benefit issues, providing effective solutions and options with costing and implementation proposals.
- Assist in special projects and additional duties as assigned.
- Interface with clients, vendors and related stakeholders, in-person and remotely, as needed representing POE interests by providing solutions, recommendations, present reports, supporting vendor negotiation and plan design and otherwise respond to client benefit related matters.

2. PAYROLL & RECORDS SUPPORT

- Develop, enhance, and execute HR/Payroll systems and activities for internal and external clients. These activities include, but are not limited to, administration of client payroll, payroll / benefits personnel record management, benefits administration, client auditing, and special projects as assigned.
- Performs all activities necessary to process one or more full cycle multi-state payrolls, including maintaining related records, filing tax reports and voluntary deduction reports, processing involuntary deductions such as levies and garnishments, preparing accounting transactions and documents, documenting and updating procedures, and preparing special reports for management.
- Ensures client payroll records are accurate and complete by conducting monthly audits of all change activity back to the original documentation.
- Interface with clients, vendors and related stakeholders, in-person and remotely, as needed representing POE interests by providing solutions, recommendations, present reports, supporting vendor negotiation and plan design and otherwise respond to internal and external client related matters.
- Conduct research and analyze data on assigned projects, and produce summary reports for submission to company executives and clients.
- Support the development, implementation and administration of base pay and incentive compensation programs, including compensation philosophy, job classification and job family structures, job pricing criteria and compensation structures.

3. SUBJECT MATTER EXPERT & LEADERSHIP CONTRIBUTIONS

- Collaborate with the Sales Team and senior management on business development activities including proposal generation, marketing and public-speaking initiatives, cross-selling opportunities with existing clients, etc. Participate in the solution design process.
- Maintain a detailed understanding of our services products in order to function as the highest point of escalation to resolve client-facing issues
- Maintain a department-based strategic plan that is in alignment with corporate goals and objectives and client expectations
- Maintain operational visibility into all service delivery functions
- Ensure that client SLA performance falls within contractual terms
- Drive internal achievement of target operating KPIs and achieve client contractual SLA performance
- Act as expert and innovation advisor to internal and external clients in area of responsibility
- Represent area of responsibility to new client prospects during sales and mobilization processes
- Help ensure broad deployment and adoption of installed products and services
- Supervise the deployment of customer satisfaction surveys to evaluate company performance
- Maintain the confidentiality and security of data accessed during the course of daily activities.
- Drive measurable continuous improvement

4. CLIENTS SUPPORTED

- The span of control represented in this Scope of Work covers both Pursuit of Excellence and any of its clients.

DESIRED QUALIFICATIONS:

EDUCATION and/or EXPERIENCE

- BA / BS in Human Resources or related field
- 5+ years of Health & Welfare Benefits Administration (inc. FSA and HSA plans, etc.) required
- 3 - 5 years HR/Payroll and Payroll Tax Administration experience required
- 3 - 4 years of Business to Business consulting experience in the Human Resources field preferred
- CPP certification strongly preferred

NECESSARY SKILLS / ATTRIBUTES

- Proven project management skills, with ability to manage multiple projects simultaneously.
- Ability to think strategically and develop tactical action plans to achieve business and people goals.
- Ability to professionally communicate both internally and externally with individuals at all levels of an organization and in one-on-one and group situations.
- Strong consultative, diagnostic and analytical skills.
- Professional demeanor, presence, behavior, etiquette and attire are required

LANGUAGE SKILLS

- Excellent written and verbal communication, organizational, and problem solving skills
- Must have articulate, grammatically- and syntactically-correct, written and verbal business-level communication capabilities
- Ability to make professional presentations and communicate in writing, through emails and reports, or orally, complex technical matters to an audience of highly technically skilled and operationally experienced staff and clients.
- Bi-lingual capability is desired (verbal and written, English and Spanish fluency)

COMPUTER SKILLS

- Strong Excel and Microsoft Office (Word, PowerPoint, Outlook) Microsoft Project
- Familiarity with HR, benefit and payroll systems (e.g. UltiPro, ADP, Paychex, Paycom)
- 3-5 years of payroll processing experience using ADP, Peoplesoft, JDE, Oracle, SAP, UltiPro or other systems, including reporting from their related reporting tools (e.g. Cognos, Crystal, Access, etc.)

PREFERRED ADDITIONAL EXPERIENCE

- Professional Services operations experience in a shared services environment
- BPO (Business Process Outsourcing) or experience working with virtual teams, e.g. remote work or off-shore

PHYSICAL /TRAVEL / WORK ENVIRONMENT DEMANDS

- Must be able to occasionally lift and/or move up to 50 pounds
- Availability to travel to client locations and professional networking events (local, state, and national) is required (up to 25%), including throughout the DFW Metroplex as requested without notice to participate in internal and external client meetings, training sessions, client lunches, etc. as requested including weekends as needed. Qualified expenses are reimbursable.
- Must maintain a valid Texas driver's license and have reliable transportation
- This position works in both an office environment with heating and air conditioning, and on-site at client locations, in support/execution of assigned duties.



Pursuit of Excellence holds multiple certifications including, Minority Business Enterprise, Woman-Owned Business Enterprise, etc.

Pursuit of Excellence, Inc. is an Equal Opportunity Employer | Qualified minorities, women, and veterans are encouraged to apply

