



REQUEST FOR PROPOSALS:

PEO

SOLUTION

RFP Issue Date: 3/1/2021

Proposals Due Date: 3/15/2021 4:00PM CST

Responses must be submitted to: accounting@mhponline.org



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Background

Introduction

Minnesota Housing Partnership (MHP) is announcing its interest in securing responses from qualified Professional Employer Organizations (“PEO”), who can demonstrate written evidence of past performance and business endeavors that align with the purpose, values and vision of MHP, to provide exemplary cost-effective human resource solutions and manage employee risks as described within this Request for Proposal (“RFP”).

MHP requires that any proposal for an PEO also include professional services necessary to implement the system, as well as MHP staff commitments to ensure successful implementation. All deployment options, including Cloud, SaaS, or Hosted solutions will be considered for this solution.

MHP conducted a review and assessment of its Human Resources needs and processes as well as its use of the current payroll system. The assessment determined that a new PEO system will improve system functionality, integration, reporting capabilities, organizational processes, and allow for the implementation of business process best practices.

Who We Are

Minnesota Housing Partnership (MHP) is a nonprofit organization which strengthens development capacity and promotes systems change to expand opportunity, especially for those with the greatest need. We support, lead, and collaborate with a diversity of partners to stimulate innovation and drive positive impact in affordable housing and community development in Minnesota and beyond.

Our team of 19 employees consist of community developers, researchers and communicators, and policy advocates who work to...

- Strengthen the ability of organizations to build and preserve housing and community assets.
- Provide original research and education resources to generate public support of vital communities and affordable housing.
- Drive efforts to secure the policies and funding needed at the regional, state, and federal levels to advance local housing and community development.



Procurement Schedule

The expected procurement schedule is listed below. MHP reserves the right to change the procurement schedule. If changes are made prior to the due date, proposers will be notified via email.

Procurement Schedule	
3/1/2021	RFP Released via email and posted online at MHPonline.org
3/8/2021	Last day to accept questions and requests for clarification on the RFP - noon
3/10/2021	Answers to submitted questions provided
3/15/2021	Proposals due – 4:00 PM (Due to Covid only accepting electronic submissions via email.)
3/19/2021	Up to three proposers elevated and notified for system demonstrations
3/26/2021	System demonstrations and implementation presentations completed
4/2/2021	Elevate and notify finalist proposer
4/15/2021	Complete contract negotiations and Statement of Work (SOW)

Proposal Submission Requirements

Proposers shall submit an electronic, PDF, version of their Proposal, no later than March 15, 2021 at 4:00 p.m. CT. Proposals shall be sent to:

Daniel Atunah-Jay
 Director of Finances & Human Resources
accounting@mhponline.org

Scope of Services

Project Goals

The limited installed functionality and lack of integration between existing systems requires that staff utilize shadow systems to support key business processes. With this project, the MHP aims to improve business processes, gain efficiencies, simplify, and standardize use of systems, and install core Human Resources system functionality.

The Project’s key goals and success indicators include the following:

- Improvement to business processes
- Implementation of business processes based on best practices
- Improvements to and updating of outdated technology
- Elimination of duplicate data entry

- Implement and broaden employee self-service capabilities with an easy to use employee interface
- Standardize business processes throughout the entire organization
- Improve access to data and reporting capabilities
- Improve project transparency
- Utilize electronic workflow
- Accessibility to source data
- Reduce time spent procuring and administering employee benefit plans

	Human Resource Function	Req Met Y/N/I
1	<p>The system must provide the following functionalities:</p> <ul style="list-style-type: none"> • Human Resources Management and Workflows: <ul style="list-style-type: none"> ○ Recruiting, Onboarding new staff / Offboarding staff, employee background checks, Compliance with Employment Laws and Regulations (Americans with Disability Act, FMLA, etc.), Employee Portal, Handbook, Forms, Performance Evaluation, Risk Management and unemployment claims handling. • Employee Benefits: <ul style="list-style-type: none"> ○ Automate MHP's benefit enrollment and administration (inquiries), Workers' Compensation Insurance, claims and complaints, Multiple Preferred Provider Organizations, Health Insurance, Dental Insurance, Vision Care, Group Life and Accident Death & Dismemberment, Disability Insurance (Short Term, Long Term), Prescription Card, Track Eligibility Dates for Benefits Conduct online Enrollments, Assume COBRA, HIPAA, ERISA Portability Compliance, HSA Plan, Employee Assistance Program, Availability of Ancillary Benefits (including but not limited to Life Insurance, Legal Services, Disability Insurance, Critical Illness Insurance, Accident Insurance, Flexible Spending Account Plan, Hospital Indemnity Insurance, and College Tuition Benefit). • Payroll and taxes: <ul style="list-style-type: none"> ○ Computation and preparation of payroll, ability to import/integrate job cost information and payroll details from MHP's timekeeping system (Unanet ERP), direct deposit, deductions for child support, levies, garnishments and any other deductions required by law, Payroll register (review before processing), employee expense reimbursements non-taxable/non-salary (ex: Cell Phone), withhold income taxes and FICA, complete quarterly tax filings, W-4s, I-9s, and W-2s, employer verification, and employee earnings records. • Workers Compensation: <ul style="list-style-type: none"> ○ Handling & investigation of employee claims and appeals, compliance with workers' compensation laws and OSHA regulations, experience refunds, managed care program, safety policies, training, assessments & inspections. • Training & Reporting: <ul style="list-style-type: none"> ○ Training modules for employees; Workers' Compensation/Safety Training and Assessment; standard reports list, customized reporting of payroll costs, total compensation reporting, and ability to create ad hoc reports. • Other: <ul style="list-style-type: none"> ○ Survey collection (preferred, not required), Skill-based testing for new hires (preferred, not required). ○ Provide a comprehensive list of other service offerings that might be beneficial to MHP. 	
2	At least one dedicated, trained, and qualified staff member will be assigned to the Client account to provide Payroll assistance, HR and Risk Management/Compliance expertise and consultation.	
3	The system should provide the user with the ability to conduct searches and generate reports at all levels by fiscal year, month, calendar year, or any user defined date.	

4	The system should maintain active and inactive employee records.	
5	The system should provide user defined security and transaction authorization levels including the ability to define record additions, changes, inquiry (view) and deletion for recruiting, payroll, onboarding, etc.	
6	Must have role/permission-based user interface for administrators, supervisors, and employees.	
7	Must have role/permission-based menu options for administrators, supervisors, and employees.	
8	Ability to track employee training.	
9	The system should store information that can be updated by employee and supervisor.	
10	System should be able to track overtime trends, assist with compensation research and show employee loss probabilities.	
11	Ability to set custom fields, metrics and workflows.	
12	System must accept uploads of any supporting documentation/document management.	

	User interface	Req Met Y/N/I
1	Should provide personalized employee dashboards.	
2	Should be extremely user friendly to employees to access and change personal information 24/7.	
3	Provide one central source for all employee needs	
4	List of all online services provided	
5	Annual benefits enrollment, and access and acceptance of employee handbook (policies and procedures)	
6	Help desk availability	

	Reporting	Req Met Y/N/I
1	The system must include the ability to create and schedule custom reports that can be used for data analysis or reporting purposes.	
2	The system must include the ability to store data in an electronic format that can be easily exported in various formats (i.e. .pdf, .xlsx, etc.) for reporting purposes.	
3	The system should have the ability to prepare all standard reports with comparisons to prior periods, such as prior month, prior quarter, and prior year-to-date.	

	Workflows, Routing and File Management	Req Met Y/N/I
1	Creation of routing workflows, checklists, and custom logic; ability to send email/calendar invites and reminders for: <ul style="list-style-type: none"> • Recruitment • Onboarding • Performance Reviews • Offboarding 	
2	Provide integration with Office 365, so that system can link to files or workflows in SharePoint	
3	Prefer to provide integration with Unanet (ERP System) and future CRM as well.	

	Data Migration	Req Met Y/N/I
1	The Proposer must be able to manage accurate & complete import of MHP's existing data from current timekeeping system.	
2	The Proposer must be able to provide guidance with data validation (e.g. removing duplicate entries, ensuring accuracy between old and new systems, etc.), providing checklists and/or advice on best practice for data transfer.	
3	The proposal must include maintenance and support for a period of 5 years.	

Proposal Response Requirements & Format

Proposal Outline

Vendors may submit for any, all or just selected portion(s) of the required services that are comprised in this RFP. If a Vendor cannot meet any particular requirement of the section that they are submitting to the Agency, the Vendor is requested to provide detail exceptions next to that requirement. Vendors that cannot meet the requirements of the sections of this RFP that they are responding to will be deemed non-responsive and not eligible for the award. Any information provided may be considered for proposal specifications.

This section sets forth the manner and content in which the proposal is to be compiled as follows:

Executive Summary

The executive summary should be limited to a brief narrative highlighting the bidder's proposal. The summary should contain as few technical terms as possible and should be oriented toward non-technical personnel. Please limit the summary to no more than four (4) pages. The executive summary should include the name of the organization submitting the proposal, the city and state in which the organization is headquartered, the city and state in which any local services are based, if different from the location that the company is headquartered, the name of the primary contact for the proposal and their email address and telephone number, and the name of the secondary contact for the proposal and their email address and telephone number.

Vendor Background & Qualifications

Proposers responding to this RFP must provide sufficient responses to all the below requests for information. Failure to respond to any of the requests may result in disqualification of the proposal. To facilitate the analysis of responses to this RFP, proposers are required to answer as simply as possible and provide a straightforward, concise description of the vendor's capabilities to satisfy the requirements of the RFP.

- Provide a brief description of the proposer's history and organization.
 - Number of years the PEO has been in business in the United States.

- Indicate if the PEO is a State of Minnesota based corporation and whether it has offices in Minnesota service area nationwide.
- Provide a copy of your State License.
- Indicate your Federal Employer Identification Number.
- Indicate if your PEO has been certified as a Minority Business Enterprise for the purposes of doing business with state government, include a copy of Minority Business Enterprise Certification.
- Describe the proposer’s experience providing similar services.
- Because MHP is working hard on its own diverse and fair staff model - placing strong emphasis on equity and inclusion - please detail for us how your organization is making a difference in these areas. (i.e. percentage of BIPOC staff, programs in place, support, etc.)
- Qualified Vendors shall describe their organization’s financial viability with particular attention given to the Vendor’s ability to continue in business for the duration of the contract period(s). The description should include an analysis of operation data for the last three (3) years and a trend analysis noting prospectively how the organization believes operations will continue based on historical results. The description should include the number of years in operation.
- Provide customer references representative of the requested solution. Such references must include multiple governmental/quasi-governmental entities.
- Fiscal management Information Narrative
 - Provide a brief description of your company’s accounting system, internal controls, and invoicing.
- Required Documents: Proposals must include the following required documents signed by the authorized representative:
 - Disclosure of Potential Conflict of Interest
 - Certification Regarding Debarment
 - Statement of Non-Discrimination
 - Certification Regarding Lobbying
 - Proof of liability insurance

Scope of Services

This section of the proposal should include a general discussion of the Proposer’s overall understanding of the project and the scope of work proposed. List and describe all proposed PEO products that will be delivered as part of the project. If service is sold by module, proposer must explicitly state the module names and versions that are proposed.

This section describes the implementation scope of the overall project and the requirements for each functional area. Responses to the functional requirements should be specify service levels to which you can commit and identify the capability of the Proposer, the scope of the implementation plus whether the requirement will be included under the scope of any proposed support agreement. Use the following response codes for the functional requirements, listed on pages four through six, titled: 1) Human Resource Functions, 2) User Interface, 3) Reporting, 4) Workflows, Routing and File Management, and 5) Data Migration. Please use a separate sheet to provide explanations as needed.

Scope of Services Responses to Project Goals (column titled Req Met Y/N/I)	
Y	Requirement Met and Proposed (Standard features in the generally available product)
N	Requirement Not Met with Proposal
I	Need More Information/Discussion

Implementation Plan

This section should describe the proposed implementation plan.

1. Provide a detailed plan for implementing the proposed system. This information must include:
 - Proposed phasing for roll-out of proposed system
 - Capabilities, experience, and commitments for each segment
 - Explanation of advantages and risks associated with this plan
2. Explain the proposed plan for implementation. This information must include:
 - Description of implementation tasks and activities
 - Description of key deliverables (and how they relate to the implementation approach and activities).
 - How will Proposer meet its service obligations?
 - How does Proposer handle service transitions?
3. Explain the proposed staffing for the project including:
 - Provide a list, resumes, credentials and certifications of all staff who will be involved in carrying out the tasks covered by this RFP. Are consultants are used?
 - Approximate time dedicated to the project of each resource and approximate time in which implementation will be completed
 - Major roles and responsibilities for each resource
 - If/when key staff are changing, how and when MHP will be notified.
4. Explain proposed project management services including:
 - Role of the vendor project manager
 - Expected role of MHP project manager
 - Proposed quality assurance procedures
 - Method of handling unexpected changes
5. Explain the expected MHP staffing for the project including:
 - Assumed participation in the project (average portion of FTE). This should include all time spent working on the project (including time spent with and without vendor/consultants)
 - Assumptions about prior skills / competencies of MHP resources

Training Plan

Proposers should provide a detailed plan for training. This information should include:

1. Overview of proposed training plan/strategy for the core project team, end-users, and technology personnel.
2. The role and responsibility of the implementation firm in the design and implementation of the training plan (e.g., development of customized training materials, delivering training to the MHP end-users).
3. Identify the planned Proposer’s activity (days or hours) related to training.



4. The role and responsibility of the MHP staff in the design and implementation of the training plan.
5. The plan assumptions for using the MHP project team resources between implementation phases.
6. Other electronic delivery of training (e.g., computer-based training).

Ongoing Support

The proposal should specify the nature of any post-implementation and on-going support for a period of five years.

- Service desk support services, including designating a single point of contact for all issues
- User Setup, Authentication and Management processes
- Application support
- Operational support services
- Technology infrastructure services
- Disaster recovery
- Will all products (including third party products) be hosted through the same provider?
- How are changes or concessions made if commitments cannot be kept?

MHP will conduct quality assurance reviews during the contract period:

- To assess the quality of services provided under this contract;
- To determine compliance with MHP requirements;
- The extent to which key indicators of performance are being achieved; and
- To validate internal quality improvement systems and findings.

Cost Proposal

Proposers should provide a not to exceed fixed cost proposal for the services to be provided under this RFP, including anticipated out of pocket costs. The cost proposal should be outlined with the per employee costs for each individual module and service.

Proposals submitted for this project should include all applicable costs for all modules and licensing fees, transfer of all stored data, training for all employees that utilize the system, and all other applicable costs to allow system to be fully functional for MHP staff. Also cite any additional costs for non-vender specific modules necessary to facilitate implementation.

Proposer should also include the cost and carriers of all benefit insurances (medical, dental, Life/AD&D, STD/LTD, vision, etc.). Costs should be detailed to cost per employee per month based on the attached Census.

Please provide a sample invoice, itemizing applicable costs and fees to include the following employer taxes:

- Social Security
- Medicare
- Federal Unemployment
- State Unemployment

Proposers should submit their price proposal with major milestones/deliverables as part of the project. Please provide a schedule of all payments necessary to complete the proposed scope.



All pricing must be submitted as fixed by cost per employee per month based and/or milestone/deliverable. Costs listed as “to-be-determined” or “estimated” will not be scored.

- All service costs must be provided on a task or completion basis with costs assigned to each milestone/deliverable, deliverable and/or task. Additional detail may be provided to further explain deliverable/task costs.
- Proposers must submit implementation costs as fully loaded rates that include any necessary travel or other expenses. Proposers acknowledge that all pricing (including travel) must be a fixed fee or included in the implementation milestone/deliverable.
- Budget Information:
 - Itemize the structure for Professional Employer Organizations, including delivery charges, and include any other fees not outlined in cost proposal for Professional Employer Organization (PEO) Services.
- Unless specifically stated otherwise in the Terms and Conditions, prices must remain firm for a period of one year from the award date. Please note how long these rates are guaranteed.
- Proposer will provide their current W-9 form.

Overview of the Proposal Review Process

MHP will review and score each Proposal submitted in response to this RFP. As outlined here, MHP will follow the following matrix to score Proposals. However, the Evaluation Committee shall select/recommend the proposal they determine to be in the best interest of MHP, regardless if the Vendor has achieved the highest score. The selected/recommended vendor will be open for contract negotiation once selected and will be submitted for Board approval on April 1, 2021.

Vendor Background & Qualifications	10%
Scope of Services	25%
Implementation Plan	15%
Training Plan	15%
Ongoing Support	10%
Cost Proposal	25%
Total Score	100%

Terms and Conditions

The following terms and conditions affect responses to this RFP and any resulting contract. These terms shall be adhered to by any interested proposer and are non-negotiable.

1. Contract Term will cover a minimum of five (5) years.
2. Confidentiality Proposer acknowledges that all information, data, records and documents disclosed by MHP to proposer, or which come to proposer’s attention during the course of its response to this RFP or performance under any resulting contract constitute valuable and proprietary assets of MHP (Confidential Information). Proposer agrees not to disclose the Confidential Information, either directly or indirectly, to any person, entity or affiliate unless required to do so by legal process of law without prior authorization by MHP. If required to disclose Confidential Information by legal

process, Proposer shall provide MHP with prompt notice so MHP may seek an appropriate protective order. Except as required to respond to this RFP or during the course of its performance under the terms of any resulting Agreement, proposer shall not use any Confidential Information for its own purposes.

3. Conflict of Interests Proposers' response to this RFP must include, in writing, disclosure of any potential conflict of interests that may arise from proposer's performing services for MHP. Any resulting contract will require that if a vendor fails to disclose a potential conflict of interest, and if MHP determines such failure to disclose involves a material conflict of interest, the vendor's contract may be declared to be void by MHP and any amounts paid under the contract may be recovered by MHP. Vendors shall advise MHP of any changes in potential conflicts of interest.
4. Nondiscrimination Pursuant to Minnesota law, any contract resulting from this RFP will include the following language regarding nondiscrimination: In connection with the performance of work under this contract, Licensor agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability as defined in Minnesota code, sexual orientation or national origin. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Licensor further agrees to take affirmative action to ensure equal employment opportunities. Licensor agrees to post in conspicuous places, available for employees and applicants for employment, notices to be provided by the recipient officer setting forth the provisions of the nondiscrimination clause.
5. Public Records Responses to this RFP, any communication with MHP, and any resulting contract and work product are subject to the public records laws of the State of Minnesota. Proposers shall mark documents "confidential" where appropriate for financial and other sensitive materials that should be, to the extent possible, be kept in confidence. MHP will notify the proposer if it receives a public records request for materials marked confidential.
6. Insurance If awarded the contract, the proposer shall maintain Worker's Compensation, Comprehensive General Liability, including Contractual Liability, and Automobile Liability insurance for any claims that may arise from operations under the contract.
7. Pricing terms and conditions stated in your submitted proposal must remain valid for ninety (90) days from the date of proposal delivery to MHP.