

**REQUEST FOR PROPOSAL  
TO PROVIDE  
HRIS and PAYROLL SERVICES**



**October 28, 2015**

# **MAGNOLIA EDUCATIONAL AND RESEARCH FOUNDATION**

## **REQUEST FOR PROPOSAL TO PROVIDE HRIS and PAYROLL SERVICES**

### **I. PURPOSE**

The Magnolia Educational and Research Foundation (“MERF”) is seeking a qualified firm to provide HRIS and payroll services on a regular and ongoing basis. MERF requires a review of its operations to ensure compliance policies and regulations, safeguarding of assets, and the reliability and integrity of information.

### **II. BACKGROUND**

MERF is a California not-for-profit organization headquartered in Westminster, California, that during the year ended June 30, 2014, operated eleven K through 12 charter schools serving 3,790 students in Los Angeles, Orange, Santa Clara and San Diego Counties. For more than a decade, MERF has delivered high quality education emphasizing science, technology, engineering and math. MERF is regularly recognized as having some of the top-performing schools in the nation with MPS Science Academy (Reseda) ranked among the top high school in the country by U. S. News and World Report and the Washington Post in 2012.

Having our students achieve their potential is an imperative for MPS, and as such each MPS charter petition delineates specific charter school’s annual goals, including goals to be achieved in the state priorities, core academic skill goals, and goals for lifelong learning and interpersonal skills. The charter petitions also describe specific actions to achieve those goals, measurable pupil outcomes, and methods for measuring pupil outcomes.

### **III. NATURE OF ENGAGEMENT**

MERF seeks to find a platform that will incorporate all HR functionality including applicant tracking, onboarding, storage and completion of relevant documents, a platform to

- A. Integration with payroll system (or combination HR/payroll package)**
- B. Performance management**
- C. Time-keeping and attendance tracking**
- D. Payroll processing**
- E. Onboarding platform which includes e-signature of relevant documents**
- F. I9 completion and storage per Federal guidelines**
- G. Reporting capabilities, standard and custom**
- H. Applicant tracking**
- I. Job and pay history**
- J. Tracking of Paid Time Off**
- K. Benefits management**
- L. Employee self-service**
- M. Electronic form processing**
- N. ACA Reporting**
- O. Training management**

- P. Integration/interface with general ledger**
- Q. Training requirements**
- R. Ability to provide reports**
- S. Annual support**

**IV. GENERAL INFORMATION**

The following is general information about MERF as of the 2014-15 fiscal year:

- Employees 400
- Frequency of Payroll is bi-monthly
- The organization uses Quickbooks on an accrual basis for its accounting software.
- Sources of income include Federal and State apportionments, donor contributions, grants and other income.

The organization is in the process of submitting an RFP to retain a HRIS vendor that will launch December 1, 2015.

**V. TIME REQUIREMENTS**

**Proposal Calendar**

The following is a list of projected key dates:

|                   |                                  |
|-------------------|----------------------------------|
| October 28, 2015  | Request for proposal issued      |
| November 2, 2015  | Due date for Proposals           |
| November 4, 2015  | Selection process                |
| November 12, 2015 | Submission to Board for Approval |
| November 16, 2015 | Implementation of new contract   |
| January 15, 2016  | First payroll processing         |

**VI. ASSISTANCE TO BE PROVIDED TO THE VENDOR**

The HR/Payroll staff will be available during the audit to assist the firm by providing information, documentation, and explanations. MERF will provide the auditor with reasonable workspace and equipment.

**VII. PROPOSAL REQUIREMENTS**

**A. General Requirements**

General requirements include the following:

Proposals should be submitted no later than 5:00 p.m. on Friday, October 23, 2015. Submit three (3) copies of the proposal by mail to the following address:

Terri Boatman  
 Director of Human Resources  
 Magnolia Educational and Research Foundation  
 13950 Milton Avenue, Suite 200B

Westminster, CA 92683

Or email at [hr@magnoliapublicschools.org](mailto:hr@magnoliapublicschools.org)

Inquiries concerning the Request for Proposal must be made via email to Terri Boatman, Director of Human Resources at [tboatman@magnoliapublicschools.org](mailto:tboatman@magnoliapublicschools.org).

- i. The firm must be licensed to practice sufficiently to meet regulatory requirements to our entire operations which include our 11 schools and home office.
- ii. To qualify the firm must have experience in payroll processing for multiple sites of not for profits charter schools and/or supporting multiple sites and the required tax filings for both Federal and State governments.
- iii. Provide a list of no less than three client references for similar nonprofit clients. For each reference listed provide the name of the organization, address and telephone number of the responsible person within the reference's organization.
- iv. Identify the principal supervisory and management staff, including engagement partners, managers, other supervisors and specialists who would be assigned to this engagement.
- v. The proposal should set forth a work plan, including an explanation of the implementation methodology to be followed, to perform the services required in this request for proposal.
- vi. A copy of the firm's most recent peer review report.

#### **B. Contents of Cost Proposal**

- i. The proposal should contain all pricing information relative to performing the HRIS system including set up, data entry, payroll processing per pay cycle, and annual costs for system management.
- ii. In addition to HRIS and payroll services, MERF anticipates an ongoing relationship with its vendor. MERF may seek advice from time to time throughout the year and would expect that this advice would be a component of the agreement.

## **VIII. EVALUATION PROCEDURES**

### **A. Review of Proposal**

MERF Audit Committee and staff will evaluate submitted proposals.

### **B. Basis of the Award**

MERF reserves the right to determine which proposals meet the basic requirements of this RFP. In addition, MERF may reject in whole or in part, any and all proposals, waive minor irregularities, and negotiate in any matter deemed necessary to serve the best interest of MERF. MERF reserves the right to reject any and all proposals that it deems have not met the prerequisites of the proposal guidelines, on anyone who has previously failed to perform properly or complete on time contracts of a similar nature. MERF also may reject a proposal that is not, in the sole opinion of MERF, able to perform to the satisfaction of MERF.

### **C. Notification**

All the participating firms will be notified whether the firm was awarded the contract.

We appreciate the time and consideration given to this request for proposal for professional HRIS/Payroll services and believe this accurately summarizes the significant terms of the services requested.