

FirstLine Schools, Inc.
Request for Proposal – PEO Services



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RFP Announcement: Monday, October 30, 2018

Mandatory Pre-Bid Meeting:
Thursday, November 15, 2018 at 10:00 A.M. CST
**Pre-Bid Meeting will be held live via Zoom Video Conference
(In-person meetings will be not be available)**

Instructions to join zoom video conference from PC, Mac,
Linux, iOS or Android: <https://zoom.us/j/245996562>

Or iPhone one-tap:

US: +16468769923, 245996562# or +16699006833,
245996562#

Or Telephone:

Dial (for higher quality, dial a number based on your current
location):

US: +1 646-876-9923 or +1-669-900-6833

Meeting ID: 245 996 562

**Any Proposers who have any issues in accessing zoom video
conference on November 15 should notify Gary Mouton, HR
Generalist via email (gmouton@firstlineschools.org) no later
than November 15, 2018 at 10:10 AM CT.**

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Request for Proposal – PEO Services

RFP Questions Due: Tuesday, November 16, 2018 by 3:00 P.M. CST

Questions directed via email to:

Rebekah Cain, Executive Director of Operations

Email: rcain@firstlineschools.org

Responses to questions received will be uploaded to the RFP page of FirstLine's website as of November 21, 2018 at 9:00 am CT.

Employee Census Data for benefits quotes will be shared with Proposers following attendance at Pre-Bid Meeting.

Proposal Submittal Deadline:

Monday, November 26, 2018 by 3:00 P.M. CST

Rebekah Cain, Executive Director of Operations

300 N. Broad Street-Suite 207

New Orleans, LA 70119

Email: rcain@firstlineschools.org

FirstLine Schools, Inc.

Request for Proposal – PEO Services

Administrative and General Information

Background: The mission of FirstLine Schools is to create and inspire great public schools in New Orleans. We do this by directly operating non-selective public schools and by developing training programs for teachers and school leaders across New Orleans.

FirstLine Schools, Inc. (hereafter “FirstLine”) operates six (6) charter schools with approximately 3,500 students during the 2018-2019 school year. FirstLine also operates a central business office. Under this RFP, the awarded Proposer(s) will provide Professional Employer Organization (PEO) services.

Our Staff: Currently we have a staff of approximately 450 employees including teachers, paraprofessionals, building services professionals, and administrators. Staff are all based in New Orleans operating out of our headquarters office or one of our six schools with the exception of one employee who works remote from Florida. The majority of our staff works full-time. Our teachers work 11-months out of the year, continue on our benefits plan and payroll during summer holiday break, and receive reserve pay during the summer holiday break. Our teachers are on at-will employment contracts that are renewed in the spring each year with spring and early summer being heavy hiring times for new teachers. Our open enrollment is in the spring/early summer with a July 1 effective date.

Purpose: FirstLine seeks proposals from qualified respondents interested in providing PEO services described in this RFP.

In alignment with our mission and as an organization with big goals to influence the future of children, hiring and retaining a quality staff is critical to our success. Key HR priorities include providing a top of the line recruiting and onboarding experience, competitive compensation and benefits, and high-quality HR customer service in order to ensure our high-quality staff are engaged and retained. In addition, competition for high-quality teachers is growing nation-wide, increasing the importance of working on initiatives to ensure our Educators are fully supported in their work.

We have recognized the need to increase efficiencies within the HR function through implementation of a fully functioning HRIS system and associated tools. In addition, we know how critical it is to offer reasonably priced high-quality benefits to our staff. While we currently offer a great benefits package, we hope to improve the package available and to reduce cost to our employees, to the extent possible.

We are interested in PEOs with experience working with the unique needs of schools including the needs of teachers and staff members who are not available during the school day, unique work-time tracking rules, systems and reporting. We are interested in PEOs that can provide high touch, high quality customer service and benefit plans that support our large and unique staff.

While the Proposer’s cost is of great importance, proposing the lowest price will not assure award of the service. FirstLine demands comprehensive, reliable, and efficient service. Failure to address FirstLine requirements or concerns with any matter will disqualify the Proposer from consideration.

Implementation Period: Commencement of planning for transition, implementation, and training is targeted to begin as of January 14, 2019.

FirstLine Schools, Inc.

Request for Proposal – PEO Services

Proposal Authorities, Restrictions & Clauses

FirstLine Authorities and Options

- FirstLine reserves the right to reject any and all proposals for any reason.
- FirstLine reserves the right to correct or waive irregularities in submitted proposals should it be deemed in the best interest of FirstLine to do so.
- FirstLine reserves the right to negotiate any and all proposals for any reason.
- FirstLine reserves the right to award to more than one Proposer.
- FirstLine has 90 days to accept a submitted Proposal; the Proposer cannot withdraw a Proposal within that 90 day period without mutual consent with FirstLine.
- FirstLine reserves the right to require a performance bond; if such is required, the cost of that bond will be reimbursed to the Contractor by FirstLine.
- Final prices will be negotiated between the Proposer and FirstLine. FirstLine reserves the right to cancel the contract award if Proposer cannot commit to a contract that has prices within 5% of what is initially quoted.

Negative Assurances

- FirstLine cannot assure that the services will be awarded to any Proposer at any time.

Prohibitions

- FirstLine shall assess, negotiate and decide on this Proposal without influence from the Proposer's employees, the Proposer's representatives or agents, the Proposer's vendors, or any other parties with a business, financial or family relationship to the Proposer.
- The Proposer is prohibited from exploiting a conflict of interest, gratuities, kickbacks, or any other type of incentive or influence upon FirstLine, its Board(s) and its agents; violators will be prosecuted to the extent of the laws pertinent to FirstLine.
- Proposers must submit a firm bid. A Proposer shall not stipulate in its proposal any conditions not contained in the contract documents. Any qualifying statements or conditions may be declared irregular and as not being responsive to the advertisement for bids.

Proposer Responsibilities

- It is the Proposer's duty to inspect all submitted documents to assure completeness, legibility, etc.
- It is the Proposer's duty to understand the RFP; any misunderstanding is the responsibility of the Proposer; FirstLine has no obligation to correct, reject or question any portion of the proposal.
- Proposer must abide by all RFP requirements; the proposal may be rejected by FirstLine regardless of the type or significance of noncompliance.

Termination of the Contract: The contract will naturally expire at the end of the contract term reviewed and agreed to between FirstLine and Prosper(s). FirstLine reserves the right to terminate the Contract with thirty (30) days advance written notice as a result of inferior quality of materials, product, workmanship, and/or reductions/termination of funding. FirstLine reserves the right to terminate the Contract immediately if there are unresolved safety or liability concerns.

FirstLine Schools, Inc.

Request for Proposal – PEO Services

Proposer Requirements

Staffing: The Proposer agrees not to discriminate against any employee or applicant for employment because of race, sex, religion, color, age, disability, national origin or sexual orientation. The Proposer will ensure that all employees who take part in on-site meetings at any FirstLine work location follow FirstLine’s visitor policy and are not unsupervised around students at any time.

Confidentiality: Proposer and its employees will treat as confidential any non-public information that is provided by FirstLine at all times (including but not limited to: employee census data and workers’ compensation history)

Assignments: The Proposer will not make any assignments or subcontract for the Work without written permission from FirstLine.

Legal: The Proposer must fulfill all obligations in compliance with all applicable laws and regulations, including the Occupational Health and Safety Act. The Proposer must notify FirstLine concerning any litigation involving the Proposer or its parent or subsidiary companies.

Responsibility and Control of Work: The Proposer will be responsible for all damage caused by its employees, its equipment or its supplies, the School’s property, equipment, buildings and building contents. The Proposer will also be responsible for all injuries to persons caused by its staff, equipment or supplies. The Proposer must be knowledgeable about and abide by all provisions of legislative enactments, State statute and local regulations in regard to safety.

Insurance: FirstLine reserves the right to require Proposer to provide insurance coverage that will minimize FirstLine’s risk exposure and proof of business license.

RFP Questionnaire

All Proposers are required to provide thorough responses to the following RFP questions:

PEO Demographics

1. Based on your current clients, please indicate:
 - a. Smallest employee size
 - b. Largest employee size
 - c. Average employee size
2. How many clients are currently using your services?
3. Do you currently have clients based in Louisiana? In New Orleans?
4. Do you currently have clients within public K-12 Education organizations?
5. What is your client turnover rate?
6. Please give a brief description of the types of clients you serve (i.e. office workers, tech, hospitality/restaurant).
7. Have you worked with non-profit or public charter schools and/or school districts of similar employee size?
8. How many employees does the PEO currently administer?
9. How many employees work for the actual PEO group (in-house administration)?

FirstLine Schools, Inc.

Request for Proposal – PEO Services

10. What is your service philosophy?
11. How are you able to ensure the support of business continuity (i.e. payroll processing) in the event of weather-related events within your region?

HR Support Team Structure

12. Are your HR, benefits and customer service support professionals available for occasional on-site support during busy times during the academic school year (i.e. new teacher orientation and open enrollment)?
13. What is the structure of your client HR, benefits, payroll and customer service teams? Please explain why you believe this is the best structure.
14. How many clients or employees does each HR and or benefits specialist support?
15. What are the average years of relevant professional experience of HR and benefits specialist support staff?
16. What are the hours (and time zone) that your HR support team will be available to support Firstline administrators and employees?
17. Are your HR and benefits professionals available to our staff? If so, how?
18. What services does the HR team provide?
(Note: “Yes” or “No” responses to items “a” through “h” below are appropriate)
 - a. Designated FMLA teams to work directly with employees on required compliance notices related paperwork, disability claim filing and FMLA tracking
 - b. Employee relations support
 - c. Assistance with medical claims issues
 - d. One-on-one support to assist employees in selecting their benefits
 - e. Direct assistance to employee spouses on insurance related matters
 - f. Routine Requests (to include but not limited to: Verifications of Employment, Loan Forgiveness Requests)
 - g. Background Checks
 - h. Form 5500 Reporting
19. Please share how your systems (people and technology) could support the increased administrative support necessary to ensure the high-volume of new school-based staff (100 to 200 new hires) are onboarded in advance of the first day of their work.

HRIS/Payroll System

20. What Human Resources Information Systems (HRIS) do you use?
21. Does your applicant tracking/new employee onboarding system include the following?
 - a. Form I-9 completion
 - b. OSHA compliance
 - c. Credential verification
 - d. Clearance of FBI fingerprints and state background checks
 - e. Link to HRIS
22. Does your HRIS provide document storage with options to have documents available based on employee “rights” such as the employee handbook, benefit summaries vs employee confidential forms?
23. Do you have an HRIS team for customizations and unique reporting or tracking needs?

FirstLine Schools, Inc.

Request for Proposal – PEO Services

- a. Does your system have the capability to create/retain employee contracts similar to an offer letter?
 - b. In what format are reports generated (i.e. option for flat files and user friendly, data dashboards)?
 - c. Do you provide Federal and State tax reporting and compliance support?
 - d. Are you able to allocate and track position by funding source?
 - e. Are you able to track company property/inventory?
 - f. Are you able to track exit interview feedback? If yes, in what format?
24. What systems does your HRIS interface with (accounting and budgeting software for example)?
25. Do you have each of the following systems within your HRIS or can you link to external systems? Please include a list of all requirements for linking to/integrating with an external system.
- a. Performance Management
 - b. Employee Onboarding
 - c. Benefits self service
 - d. Applicant Tracking
26. Please describe your current Time and Attendance tracking solution.
- a. Please describe if Time and Attendance tracking solution allows for tracking of multiple jobs.
27. Does your staff assist with reaching out to employees who do not complete their timesheets?
- a. Can you run payroll if an employee fails to complete his or her timesheet?
28. Is your HRIS able to track and report on K-12 education-specific information such as: subject area, grade level, years in Education, years of service at Firstline Schools, years of service within subject area, years of service within grade level, and licensure/certification?
29. Does your HRIS allow for employee self-service access to the following
- a. Pay stubs
 - b. Benefit enrollments
 - c. Beneficiary information
 - d. Tax withholding elections

Group Benefit Plans

30. What insurance benefits would be available to our staff?
31. What is the structure of your benefits program (i.e. is each client under their own group ID through your carriers or is each group included under one master group with the carriers)?
32. Please list the insurance carriers and ancillary benefit vendors that would be available to FirstLine Schools.
33. Would you permit a client to retain their own (internal) benefit plans or do you require all clients to use your benefits plans/program?
34. What ancillary plans do you offer?
 - a. Group Legal plans
 - b. Pet insurance
 - c. Home and car insurance
 - d. EAP
 - e. Products for spouses and children
 - f. 529 college savings plans
 - g. Financial planning
35. What complementary benefits do you offer?

FirstLine Schools, Inc.
Request for Proposal – PEO Services

Staff Training and Development

36. What training programs would be available to our staff (Safety, Harassment, Stress Reduction, Communications, Supervisor Skills for New Managers, Bloodborne Pathogen Training (required for school-based staff), etc.)?
- a. How would these trainings be provided?
 - b. Are on-site trainings available?
 - c. Are there additional fees for trainings?

RFP Bid Process

Submission: The Proposer will submit the following by **Monday, November 26, 2018 at 3:00 P.M. CST.**

- One electronic copy of all documents (via email or USB device)

Submission should be delivered by email, mail or by hand to:

Ms. Rebekah Cain, Executive Director of Operations
FirstLine Schools
300 N. Broad Street, Suite 207
New Orleans, LA 70119
Email: rcain@firstlineschools.org

Any questions regarding this RFP should be directed to Rebekah Cain, Executive Director of Operations, at rcain@firstlineschools.org by November 16, 2018 at 3:00 P.M. CT. Responses to questions received will be uploaded to the RFP page of FirstLine’s website as of November 21, 2018 at 9:00 am CT.

FirstLine Schools, Inc.

Request for Proposal – PEO Services

Evaluation: A variety of weighted criteria, given below, will be considered in evaluating proposals. This evaluation will be made based on information provided within the Proposal, by the Proposer during RFP specific presentations or negotiations, client references, and industry references.

Component	Scoring Scale	Evaluation Criteria
Proposal Quality	0-50 points	Award of a purchase order or contract is based on the best value to FirstLine: quality, availability, service delivery, specifications, terms, conditions, and fitness for the particular purpose. When a solicitation requires an oral presentation, submission of work samples, or product demonstration, these factors are part of the component evaluation.
Price	0-30 points for each (Price, Professional References & Company Financials) The highest score is 30 points; however, applicants failing to address a Component entirely will receive a score of zero.	Lowest bid(s) receive 30 points; Highest bid(s) receive 0 points; all other bids receive between 29 and 1 points. The total cost may include categories identified in the solicitation in <i>Attachment A: Pricing & Service Proposal</i> .
Professional References		Relevant professional experience will be assessed to evaluate the Proposer's stability, experience, and record of past performance in delivering the service to organizations with like size, operational, and service requirements.
Company Financials		Three years of most recent audited company financials are requested. The audited financial reports will be reviewed to determine if the company has the financial capacity to perform the work outlined in the contract.
Headquartered in Orleans Parish	0-20 points each	Principal of Business and Registered Office in Orleans Parish as listed with the Louisiana Secretary of State.
State & Local Disadvantaged Business Enterprise	Applicant has provided verifiable evidence of component described by the Evaluation Criteria	A for-profit small business where socially and economically disadvantaged individuals own at least a 51% interest and also control management and daily business operations. As a certified DBE, a certificate issued by the City of New Orleans or other certifying agency must be provided with the submission.
Executive Resumes	0-10 points for each	Consideration is also given to the applicants' potential ability to perform successfully under the terms and conditions and their past performance record.
Community Involvement	Applicant can successfully demonstrate the Component as described by the Evaluation Criteria	Demonstrated organizational commitment to programs or public service initiatives serving the youth of New Orleans community relationships.
Innovation		Proposal demonstrates innovative means and methods.

FirstLine Schools, Inc.

Request for Proposal – PEO Services

Projected Project Schedule & Due Dates

Date	Event
October 30, 2018	Distribute RFP
November 15, 2018 at 10:00 am CT	Pre-Bid Meeting via Zoom Video Conference
November 16, 2018 by 3:00 pm CT	Proposer questions to FirstLine Schools due
November 21, 2018 by 9:00 am CT	Responses to Proposer's Questions Provided
November 26, 2018 by 3:00 pm CT	Proposals Due
November 27-30, 2018	RFP Reviews, Selection of Finalists
December 3-11, 2018	Proposer Demos (via Remote Meeting), Requested As Needed
December 12-18, 2018	Decision/Selection Meetings
December 21, 2018	Finalize Selection Decision
January 2-9, 2019	Contract Negotiations with Selected Proposer
January 14, 2019	Anticipated Commencement of Planning for Transition, Implementation, and Training.

FirstLine Schools, Inc.

Request for Proposal – PEO Services

Proposal Requirements

1. Executive Summary (2 pages maximum)
2. Company Overview/Fiscal Responsibility Summary
 - a. Experience in the education industry in New Orleans (Pre-K through College)
 - b. Cost-Containment Strategy
 - c. Organization Chart
 - d. Resumes of Key Contributors (bios will not be sufficient)
 - e. PEO accomplishments, marketing packages including collateral about PEO and pertinent Press Releases
 - f. Accreditations
 - g. Independent (third party) accounting procedure review
3. Performance History & Preparedness for FirstLine
 - a. Proposer's references (minimum 3) including company name, contact and phone number
Note: Non-profit and/or public K-12 organizations are preferred
 - b. Summary of ability to take on the additional workload expected by the Proposer
4. Customer Service Proposal
 - a. Management/Supervision Structure
 - b. How the Proposer plans to monitor and measure service quality
 - c. When/how the Proposer plans to keep clients informed of service quality (sample reports)
 - d. Contingency/Coverage plan for expected and unexpected absences or staff turnover
 - e. Plan for maintaining responsiveness/communication with FirstLine leadership (HR, Operations, Finance, Data)
 - f. Other methods for ensuring high-quality customer service
5. Implementation/Transition/Training Plan
 - a. Proposed Transition and Training Timeline
6. A list of the dedicated staff, if any, that would be assigned to FirstLine School's account, should we choose to work with your PEO
7. Benefits Proposal including:
 - a. All available benefits including an overview of coverage and rates
8. Completed RFP Questionnaire (outlined above)
9. Description of background screening services (i.e. screening packages)
10. Samples to be included with Proposal - please submit a sample of the following:
 - a. New hire packet
 - b. Benefits guide
 - c. Detail payroll job costing report
 - d. Sample invoice
11. Pricing & Service Proposal – Attachment A
12. Contact Information/Bid Authorization – Attachment B
13. Non-Collusion Affidavit – Attachment C
14. Responsibility Disclosures – Attachment D
15. Checklist of Required Elements – Attachment E

FirstLine Schools, Inc.

Request for Proposal – PEO Services

ATTACHMENT A

Page 1 of 1

PRICING AND SERVICE PROPOSAL

All Proposers must submit a cost breakdown for the implementation & ongoing PEO services as described in this RFP. All Proposers must agree to keep these prices valid for 120 days as of the closing date for this RFP. Proposers must indicate the fee for each category in the table below as well as indicate any additional fees not represented in the categories below.

Service (if service is provided for no additional fee or additional information needed for quote, please indicate as such)	<u>Fee</u>
Fee Model (i.e. per employee per month, Flat fee per pay, etc.)	
Setup Fees	
Bundled or unbundled (i.e. base fee includes taxes, workers' comp, admin, employer paid benefits) or Unbundled (i.e. each fee is shown separately on the invoice)	
Basic Admin Fee per pay period (24 pay periods)	
Per employee/per month charge	
Worker's Comp Rate	
FICA	
FUTA	
Carrier Connection Fees	
Benefits Administrative/Self Service fees	
Performance Management system fees	
Recruitment assistance service fees (i.e. applicant review, reference checking, offer processing)	
ACA tracking and reporting	
Time and Attendance system	
W2 Processing	
New Hire Onboarding (please indicate if in person or via telephone)	
Online Learning Management System	
In person training fee	
Commuter benefits system fee	
FSA fee	
Applicant Tracking System	
Indicate <i>average</i> increase in administrative fee within last 2 years (based on current clients, like organizations)	

FirstLine Schools, Inc.
Request for Proposal – PEO Services

ATTACHMENT B

Page 1 of 1

CONTACT INFORMATION/BID AUTHORIZATION

Primary Contact Name	
Primary Contact Phone Number	
Primary Contact Email Address	
Company Legal Name	
Company Address	
Company Website	

Company Website	
Year Company Founded	
Years Operating in New Orleans	
Number of Clients	
Number of Employees	
Certified SLDBE (yes/no)	
If YES, Year Certified	

Authorized Representative Name	
Authorized Representative Signature	
Date of RFP Bid Submittal	

FirstLine Schools, Inc.
Request for Proposal – PEO Services

ATTACHMENT C

**Non-Collusion
AFFIDAVIT**

STATE OF _____

PARISH/COUNTY OF _____

BEFORE ME, the undersigned authority, personally came and appeared, _____, (Affiant) who after being duly sworn, deposed and said that he/she is the fully authorized _____ of _____ (Entity), the party who submitted a Proposal/Contract/Bid/RFP/SOQ No. _____, to FirstLine Schools.

Affiant further said:

- (1) That Affiant has not and will not employ any person, either directly or indirectly, to secure the public contract under which he/she is to receive payment, other than persons regularly employed by the Affiant whose services, in connection with the project or in securing the public contract, are in the regular course of their duties for the Affiant; and

- (2) That no part of the contract price was paid or will be paid to any person for soliciting the contract, other than the payment of normal compensation to persons regularly employed by the Affiant whose services with the project are in the regular course of their duties for the Affiant.

Signature of Affiant

SWORN TO AND SUBSCRIBED
BEFORE ME ON THIS _____ DAY OF _____, 20____.

NOTARY PUBLIC

FirstLine Schools, Inc.
Request for Proposal – PEO Services

ATTACHMENT D

Responsibility Disclosures

Responses to the following questions must accompany the contractor’s bid. A bid may be deemed non-responsive if the contractor fails to provide complete answers or provides false statements to any of the questions provided herein. If any change(s) occur(s) during the bidding process, updated responses must be provided within thirty (30) calendar days of such change(s).

1. Please indicate whether, within the past five (5) years, your firm has been the defendant in any type of court action(s) for (an) alleged violation(s) of labor or employment laws in connection with a contract for custodial services. Yes No

If yes, please explain the circumstances, including the specific allegation(s) filed against your firm; the name of the plaintiffs; the case number; and the disposition/current status of each case.

2. Please indicate whether, within the past five (5) years, your firm or any of its owners, partners, or officers, has/have ever been investigated, cited, assessed any penalties, or found to have violated any labor or employment laws. Yes No

If yes, please explain the circumstances, including the specific charge(s) filed against your firm, its owners, partners, and/or officers; the agency that was involved; and the disposition/current status of each case.

3. If a license is required for any of the services performed by your firm, please indicate whether, within the past five (5) years, your firm, or any individual employed by your firm, has been investigated, cited, assessed any penalties, subject to any disciplinary action by a licensing agency, or deemed to have violated any licensing laws. Yes No

If yes, please explain the circumstances, including the specific charge(s) filed against your firm; the licensing agency that was involved; and the disposition/current status of each case.

Signature of Legally Responsible Party

Date

FirstLine Schools, Inc.
Request for Proposal – PEO Services

ATTACHMENT E
Page 1 of 1

CHECKLIST OF REQUIRED ELEMENTS

ITEM	PAGE	INCLUDED (y/n)	INITIALS
Executive Summary			
Company Overview/Fiscal Responsibilities Summary (to include items “a” through “g”)			
Performance History & Preparedness for FirstLine (to include items “a” and “b”)			
Customer Service Proposal (to include items “a” through “f”)			
Implementation/Transition/Training Plan & Timeline			
List of dedicated staff (if any) that would be assigned to FirstLine if Proposer is selected			
Benefit Proposal (including all available benefits, overview of coverage and rates)			
Completed RFP Questionnaire			
Description of background screening services			
Samples of New Hire Packet, Benefits Guide, Detail Payroll Job Costing Report, and Invoice			
Pricing & Service Proposal – Attachment A			
Contact Information/Bid Authorization – Attachment B			
Non-Collusion Affidavit – Attachment C			
Responsibility Disclosures – Attachment D			
Checklist (This Document) – Attachment E			
Electronic Copy	n/a		

END OF RFP