



**SACRAMENTO
STEPS FORWARD**

**NOTICE of INVITATION TO BID
ITB NO. 202409001PR**

Sacramento Steps Forward (SSF) is a 501(c)(3) nonprofit that partners with local, state, and federal agencies and receives state and federal funding to support programs to accomplish our shared goal of ending homelessness. We focus on strengthening our community's response to homelessness by utilizing data and analytics to drive system-level changes, prioritize racial equity, and enhance access to services. SSF works to prevent and end homelessness through our five core services:

1. **Lead Community-Wide Planning and Engagement** – As the Continuum of Care (CoC) agency for our region, we guide initiatives, coordinate resources, and foster collaborative partnerships to strengthen our community's response to homelessness.
2. **Increase Capacity & Knowledge** – We notify providers and the community of capacity-building resources and develop and maintain provider training and curriculums.
3. **Manage Funding & Compliance** – We identify and apply for state and federal funding, and track, evaluate, and monitor fund use and compliance.
4. **Collect, Process, & Share Data** – We administer the Homeless Management Information System (HMIS) for Sacramento County and develop and share data to inform new initiatives and program improvement.
5. **Facilitate Access to Shelter, Housing, & Services** – We collaborate with, integrate, and support housing and shelter programs in the Coordinated Access System (CAS), and manage client referrals to participating providers.
6. **Improve Equity, Fairness, Efficiency, & Effectiveness** – We evaluate and encourage racial equity, inform system standards supporting those experiencing homelessness, and evaluate the inclusivity of the client's experience.

NOTICE IS HEREBY GIVEN that sealed proposals with bid price submittal will be received by Sacramento Steps Forward Procurement Team (SSF), for furnishing all services and materials as necessary to provide Human Resources (HR) and/or Payroll services as provided in the Invitation to Bid (ITB) documents in strict accordance with the specifications on file at the office of Sacramento Steps Forward at 2150 River Parkway Suite 385, Sacramento, CA 95833. SSF is committed to offering accessible and equitable procurement. Should a bidder need help accessing available information about this opportunity, contact SSF using the information below.

LOCATION OF THE WORK: Sacramento Steps Forward’s office is in Sacramento, California. Work may be done remotely but must be accessible at the SSF location.

DESCRIPTION OF WORK: The work to be performed shall include, but not be limited to:

- HR Services, as defined, at a minimum, in Appendix A
- Payroll Services, as defined, at a minimum, in Appendix A
- Combined HR and Payroll outside of a Professional Employee Organization (PEO)
- SSF has determined PEO is no longer a consideration as part of this Invitation to Bid.

Background:

Sacramento Steps Forward is seeking Human Resources (HR) and/or Payroll services to support their operations. Currently the organization receives combined HR and Payroll services through a single provider. SSF has grown and would like to consider options.

SSF has an employee head count as follows:

Full-time employees: 52
Part-time employees: 0
Non-exempt: 36
Exempt: 16

Sacramento, CA serves as the place of work for all but 4 or 5 employees who reside out of California and are classified as fully remote employees. At the time of this ITB these employees are located as follows:

Seattle, Washington (one full-time employee)
Reno, Nevada (one full-time employee)
San Benito, TX (two full-time employees)

The majority of SSF staff are working a hybrid schedule.

Benefits:

The current health insurance options are included in Attachment B.
The 2023 costs for all medical carriers are listed below.

CoPower (Vision)	6,186.70
California Choice (Medical & LTD)	367,153.31
Reliance Standard (Life Insurance)	31,218.93
Ameritas (Dental)	34,577.20
Totals	439,136.14



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The 2024 current Workers' Compensation coverage and related costs are: \$\$15,004.

Total 2023 HR and Payroll related vendor costs were \$ 74,656.

January to July 2024 HR and Payroll related vendor costs are \$31,960.

Pay cycle is bi-monthly.

INVITATION TO BID SUBMISSION REQUIREMENTS

Please provide a detailed work plan, including a timeline, as to the transition to and implementation of your services for HR and/or implementation of your services for Payroll. The response must include all available services vendor provides for HR and for Payroll. The plan should address the three phases outlined below and include detailed associated costs:

Phase I: Assessment and Implementation Plan for HR/Payroll Services

- A. Review and evaluate current HR and Payroll needs. Identify required and/or recommended changes in services, based on the services currently being received.
- B. Develop a detailed implementation plan, including:
 1. Describe which HR and Payroll services are being proposed:
 - a. HR
 - b. Payroll
 - c. Combined HR and Payroll outside of a PEO model
 - d. Professional Employee Organization (PEO) model
 2. Describe which functionality services (Attachment A) are included in the services being proposed.
 3. Describe Timekeeping system transition.
 4. Include how transition system testing occurs
 5. Describe detailed transition activities and timeline to provide proposed HR and/or Payroll services.
 6. Describe what a User Manual for functional users will include for HR and/or Payroll/Accounting and a user manual for employees.
 7. Include a training schedule and content for users in the functional responsibility areas (HR and Payroll) and training for all staff on HR and/or payroll based on user role.
 8. Describe the overall implementation HR and/or Payroll services.

Phase II: On-going HR/Payroll Services



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- A. Please describe the support provided directly to the SSF HR and/or Payroll/accounting staff, including the hours available to problem solving.
- B. Please describe the support provided directly to SSF employees for HR and/or payroll, including the hours available to provide direct assistance.
- C. Please list the standard reports provided on a real time, daily, monthly, annual basis that are included in the base fees.
- D. Please list State and Federal reporting provided that are included in the base fees.

Phase III: Annual Review of HR and/or Payroll Services

- A. Please describe the process to provide SSF with an evaluation of HR and/or Payroll Activities annually with recommendations to improve HR and Payroll Services

COSTS SUBMISSION

Include detailed costs for each of the areas being proposed, HR/Payroll/PEO. Detail must include:

- Basis of base fees and the invoicing cycle (pay period/monthly, etc.).
- Any upfront costs SSF would be required to pay.
- Services included in base fees.
- Areas or services not included in the routine charges resulting in extra fees/charges.
- Additional cost for onsite at SSF offices meetings/services.
- Quarterly or annual fees not included in routine charges.

DELIVERABLES AND TIMELINE: The deliverables and timeline requirements are below. SSF reserves the right to adjust prior to execution of contract with the Awardee:

Phase I: Implementation from November 1 to December 31, 2024, with a “go-live” date of January 1, 2025.

- A. Provide full evaluation with recommendations due November 30, 2024.
- B. Implementation Plan due November 30, 2024.
- C. Implementation process December 1- December 31, 2024.
- D. Go live effective January 1, 2025 payroll cycle.

CONTRACTOR BUSINESS REQUIREMENTS: Contractor must be registered with the Secretary of State’s Office and in good standing. Contractor must be in compliance with all laws, regulations, codes and requirements to operate the business in all 50 states. Contractor must provide a Unique Entity Identification number from SAM.gov.

DEBARRED CONTRACTORS: The regulations at 2 CFR Part 180 restrict awards,



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subawards and contracts with certain parties that are debarred, suspended, or otherwise excluded from, or ineligible for participation in federal assisted program, project, or activities. Contractors that have been debarred and are listed on the federal Systems for Awards Management found at SAM.gov, will not be eligible to participate.

BEST AND FINAL OFFER (BAFO): SSF reserves the right to invite top bidders to negotiate a BAFO. Bidders are cautioned to propose their best possible offer at the outset of the original proposal process, as there is no guarantee that any bidder will be allowed an opportunity to submit a BAFO through negotiation. The BAFO process will be provided to any Bidder invited to negotiate for a Best and Final Offer.

AWARD OF CONTRACT: The award of the Contract, if it is awarded, will be to the Bidder whose bid complies with all the requirements prescribed and receives the highest score. SSF reserves the right, after opening bids, to reject any or all bids, to waive any informality in a bid, to make awards in the interest of SSF, and to reject all other bids. SSF intends to award a Service-level Contract for a term of 2 years with an annual review of services and costs. Upon mutual agreement, the Contract may be amended.

AWARD APPEAL: Within two business days from the Award Decision Notification a Bidder may appeal the decision. The Bidder must submit their intent to appeal via email to the RFP Coordinator. SSF will only consider appeals for the following reason(s):

- The RFP requirements were not complied with.

Bidders appealing the decision will have 7 business days from receiving confirmation from SSF to submit their justification for the appeal. Within 3 business days from receipt of appeal justification, the RFP Coordinator will provide a final decision to the Bidder.

MINORITY AND WOMEN OWNED BUSINESS: As applicable, Bidders will document status as a Minority Business Enterprise (MBE), a Women-owned Business Enterprise (WBE) or a non-MBE/WBE business. Sacramento Steps Forward encourages the participation of MBE and WBE businesses to the greatest extent feasible in CoC- funded activities in accordance with Executive Order 11625 and Executive Order 12138.

CONFLICT OF INTEREST: A conflict of interest (COI) may occur when an individual or organization is unable, or appears to be unable, to be impartial in conducting their responsibilities to SSF or exercise undue influence. This also includes situations that create, or may create, a real or apparent conflict. The contractor selected may not solicit organization employees, collaborative partners, or clients to purchase goods or services of any kind for non-scope of work purposes, or to make contributions to any organizations or in support of any causes.



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LABOR REGULATIONS: The Contractor shall comply with all applicable requirements of the California Labor Code and SSF's Municipal Code, and the labor codes in every state from which an SSF employee resides, as applicable.

BONDING REQUIREMENTS: The Contractor shall comply with any and all Bonding requirements as applicable. Federal grant funds used for the services are subject to 2 CFR 200.326.

INVITATION TO BID ADMINISTRATION/QUESTIONS: All questions related to this ITB prior to opening bids shall be prepared in writing and transmitted to the attention of Procurement@sacstepsforward.org.

All questions must be submitted to Procurement@sacstepsforward.org by close of business on September 10, 2024. Please include the ITB#, vendor name along with the submitted question. Responses will be sent to all vendors without reference to the vendor who asked the question.

No inquiries will be accepted later than two (2) business days prior to the bid opening date as this would not allow time to respond to all plan holders. No phone inquiries will be accepted.

TIMELINE:

Invitation to Bid Solicitation	September 3, 2024
Bidder Questions Due	September 10, 2024
Bids Due to Sacramento Steps Forward	September 30, 2024
Notice of Award or BAFO option	October 30, 2024

Published: Website Link [here](#)

Date: September 3, 2024



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Attachment A

General. Please explain how your services provide support for the following HR/Payroll processes.

1. Overall security processes to protect employee's Personal Identifiable Information (PII).
2. Reporting capabilities that are standard with the proposed services.

Recruitment. Please explain how your services provide support for the following processes:

1. Creating job descriptions and job postings.
2. Postings to recruitment sites in support of diverse candidate pools.
3. Review of job applicants for initial screening to determine eligibility.
4. applicant tracking tool.
5. interview rubrics.
6. On-line repository for interview notes and scoring.
7. Populates selected applicant to the employee information for a new hire.

HR. Please explain how your services provide support for the following processes:

1. Complete employee onboarding process ensuring compliance with State and Federal laws, including: preparing offer letters, completing background checks (including processing Affirmative Action notices as needed, uploads data to HRIS system, and sends payroll documents to payroll department.
2. Update and maintain the Employee Handbook.
3. Provide and track required HR trainings
4. Update and maintain the COVID-19 Prevention Program / Injury & Illness Prevention Program (IIPP).
5. Track employer pull notice additions/deletions and private vehicle authorization
2. Maintain data elements including but not limited to employee ID, basic demographics, address information, emergency contacts, survivor/beneficiary information, dependent information, history of salary changes (effective start and end dates) including eligibility for stipends, training/certification, and history of personnel actions.



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3. Store and view employee photo.
4. Track SSF property (badge, phone, vehicle, etc.) provided to the employee throughout tenure with SSF.
5. Support position control reporting, including:
 - a) filled vs. vacant positions
 - b) position type
 - c) associated positions to each funding source
 - d) identifies limited term positions by funding source
 - e) track split funded positions across multiple funds, departments or programs, full-time, part-time of limited-term positions
6. Leave of absence administration.
7. Annual Personnel file audit.
8. Keeping SSF abreast of new HR Laws and updates to maintain compliance in accordance with State (all states where SSF employees reside) and Federal Laws.
9. EEO Reporting
10. ADA Accommodation administration
11. Supplies Labor Law Posters for all states employees are working
13. Performance Management
14. Employee Relations and Investigations Support

Benefits. Explain how the HR/and/or Payroll services provides/supports:

1. Compliance with federal and states requirements, including:
 - a. Affordable Care Act (ACA)
 - b. Consolidated Omnibus Budget Reconciliation Act (COBRA)
 - c. Health Insurance Portability and Accountability Act (HIPPA)
2. Supports various retirement options.
3. Supports pre-tax withholding of eligible benefits.
4. Manages life-event benefit changes and updates employee records.
5. Invoices for health care deduction amounts for COBRA participants.
6. Administer flexible spending reimbursement accounts.
7. Reports on all health related and benefits payments made on behalf of SSF employees.

Leaves. Explain how the HR and/or Payroll services provides/supports:

1. The leave process from identification of the need for a leave, manage and report on leave balances.
2. Establishing and monitoring caps on accruals.
3. visibility on leave balances to supervisors and employees.
4. Communications with employees on leaves that may stop accruing.
5. Ability to freeze leaves.



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Performance Reviews. Explain how the HR and/or Payroll services provides/supports:

1. Notifications to managers/supervisors/employees with lead time for review completion.
2. Routing for completion and approvals.
3. Maintain the performance evaluation forms and attachments.
4. Provide alerts on past due evaluations.

Personnel Actions. Explain how the HR and/or Payroll services provides/supports:

1. Process for tracking and reporting of all personnel actions from initiation, review, authorization, and approvals for all pay and classification changes, discipline, separations, leave, etc.
2. Accuracy in the HR and Payroll records to reflect all personnel actions.
3. End dates, if necessary, to stop action at a specified date.

Employee Self Service. Explain how the HR and/or Payroll services provides/supports:

1. Employee self- service. Explain how the services address what employees can update via employee self -service (i.e. W4, life events, address, etc.) and how do those updates are visible to HR and Payroll staff in those respective systems.
2. Employees ability to view paycheck history, W2 history, personnel actions, leave balances, etc.; resetting of password; mobile device access.
3. Managers/supervisors access to employee related information such as emergency contact information, leave balances, time off requests, performance evaluation, training, certifications and historical information.

Payroll. Explain how the HR and/or Payroll services provides/supports:

1. Managing employee pay, including wages, special pay, overtime, state and federal taxes and accruals, FLSA, including out of state pay for remote employees.
2. Retroactive pays (e.g. salary, benefits, contributions, and deductions).
3. Process and track garnishments.
4. Allowing variable cycle deductions (every pay cycle, second pay cycle, or combination of the two).
5. Prevents exempt employees from being paid overtime.
6. 401K employee contributions and employer match.
7. Providing a pay “proof” run for review prior to final pay run.
8. Providing full payroll edit list detailing exceptions, including hours and dollars to be paid with control totals.
9. Producing special or immediate (on-demand) checks.
10. Direct deposit ACH format with multiple deposit accounts/employee.

Employee Expense Reimbursement. Explain how the HR and/or Payroll services provides/supports:

1. Online reimbursement forms and attachments for employee reimbursements.
2. Expenditure reports to support reimbursement claims.



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Timekeeping. Explain how the HR and/or Payroll services provides/supports:

1. Timekeeping support including how time is collected, and from what types of sources (e.g. employee self-service, mobile devices, etc.) perform exception-based time entry, and time adjustments to multiple work schedules.
2. Validation of business rules at the time of collection (i.e. prevents employees from entering adjustments that will cause employee leave balances to be exceeded) and prevents employees from entering invalid data such as charge codes or pay codes.
3. Time entry coded to projects, grants, and funding sources for each line of time entered.
4. Attribute time to one or multiple funding sources (including grants) and/or one or more projects
5. Attribute time to projects at a task level which might have a different funding source.
6. Tracking hours to special codes which might be related to leaves, such as FMLA
7. Includes an employee attestation to the accuracy of the time entered.
8. Email notification to staff and supervisor who have not completed required time entry.
9. Corrections/adjustments to reported funding sources and projects
10. Provides reports sorted by supervisor, projects, grants, funding sources

Separation/Offboarding. Explain how the HR and/or Payroll services provides/supports:

1. Off boardings due to termination, resignation, retirement, etc.
2. Checklists in support of all HR and related payroll activities to complete for successfully exiting an employee consistent with the type of separation.
3. Updates employee records in HR and Payroll records.
4. Workflow in support of offboarding.
5. Recovery of issued equipment to employee.

Accounting. Explain how the HR and/or Payroll services provides/supports:

1. Automatically feeding pay and benefits related information into QuickBooks.
2. Queries into accounts for both active and inactive accounts.
3. Journal processing capabilities, including details for allocations and distributions, reversals and corrections and as needed, identifies the source of journals.
4. Options for creating a journal entry, such as import from Excel, copy a prior journal, reverse, etc.



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Attachment B

Employee Benefits Information Packet *Benefits Overview Provided to New Employees*

Congratulations on your new position and welcome to the new hire enrollment for Sacramento Steps Forward! New hire enrollment gives you the opportunity to enroll yourself and any eligible dependent(s) into coverage.

Sacramento Steps Forward is pleased to offer eligible employees a comprehensive benefits program as part of their total compensation package. Sacramento Steps Forward will continue these benefits as the Organization's profits permit. However, the Organization reserves the right to change or eliminate any benefit plan or program at any time.

Health	Sacramento Steps Forward offers medical insurance through CalChoice. <u>Sacramento Steps Forward sponsors 100% of the employee only cost of the Kaiser Gold HMO B plan.</u> If you enroll into an unsponsored plan, you may need to pay an additional premium cost. Employees may also elect to enroll dependents into their health plan; however, all dependent costs would be covered by the employee. Effective 12/1/2023 Sacramento Steps Forward will cover 50% of the dependent coverage cost <u>of the Kaiser Gold HMO B plan</u> . Effective 12/1/2023 Employees have the option of waiving coverage and Sacramento Steps Forward will provide \$300.00 Cash in Lieu of benefits; however, the Employee will need to provide proof of coverage elsewhere. Please refer to your personalized employee enrollment worksheet for information regarding rates and plan details. To review the summary of benefits for each plan outlining what is covered and the cost please visit: http://www.calchoice.com/Documents/Index.aspx
Dental	Sacramento Steps Forward offers dental benefits through Ameritas. <u>Sacramento Steps Forward will sponsor 100% of the employee cost for the Gold Plan.</u> If you enroll onto an unsponsored plan, you may need to pay an additional premium cost. Employees may also elect to enroll dependents onto their dental plan; however, all dependent costs would be covered by the employee. The dental plan is a PPO allowing you to visit any dentist you choose. You can visit http://www.ameritas.com/ for a list of participating dentist providers. Please refer to the plan summary for additional information.



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<p>Vision</p>	<p>Sacramento Steps Forward offers a voluntary vision plan benefit through VSP. You are not required to enroll in the vision plan. <u>Employees cover the entire cost of this benefit.</u> Please review benefit summary enclosed. To find a provider, please see https://www.vsp.com/</p>															
<p>Discount Vision (this is not a vision plan)</p>	<p>Sacramento Steps Forward offers employees a discount vision benefit through CalChoice at no cost. <u>You must be enrolled in the medical plan to receive this discount.</u> Employees will receive a discount card once enrolled. Providers are conveniently located in stores like Sears, JCPenney, participating Pearle Vision Centers and many others. To find the provider closest to you, visit www.eyemedvisioncare.com and click on EyeMed Vision Care Providers.</p>															
<p>Employee Assistance Program</p>	<p>Sacramento Steps Forward offers an Employee Assistance Program that offers assistance with finding child care, purchasing a car, real estate transactions, divorce, tax questions and more! To access the program, call (800) 252-4555. This program is available at no cost to employees.</p>															
<p>Life Insurance & Long-Term Disability</p>	<p>Sacramento Steps Forward offers a \$25,000 term life insurance policy for all employees at no cost through CalChoice (this policy is transferable). <u>Employees can not opt out of life insurance coverage. All employees must enroll.</u> Sacramento Steps Forward offers disability after 90 consecutive days of being totally disabled. The long-term disability policy pays up to 60 percent of your salary resulting from sickness or injury.</p>															
<p>Retirement Plan</p>	<p>Sacramento Steps Forward offers a 401(k) plan for eligible employees in order to assist in planning for retirement. For more information regarding eligibility, contributions, benefits and tax status, contact the accounting department or Human Resources. All eligible participants will receive a summary plan description. Effective 1/1/2024 Sacramento Steps Forward will provide Employees with 1 year of service a 3% company match.</p>															
<p>Vacation</p>	<p>Vacation is accrued per pay period based on years of service as follows:</p> <p>Regular Full Time Employees:</p> <table border="1" data-bbox="397 1617 1599 1795"> <thead> <tr> <th>Years of Service</th> <th>Semi-Monthly Accrual (hours)</th> <th>Stated Annually</th> </tr> </thead> <tbody> <tr> <td>0-5</td> <td>4</td> <td>96 hours (2.5 weeks)</td> </tr> <tr> <td>5-10</td> <td>5</td> <td>120 hours (3 weeks)</td> </tr> <tr> <td>10-15</td> <td>6</td> <td>144 hours (3.5 weeks)</td> </tr> <tr> <td>15 +</td> <td>7</td> <td>168 hours (4.2 weeks)</td> </tr> </tbody> </table> <p>Part Time employees working at least 20 hours per week:</p>	Years of Service	Semi-Monthly Accrual (hours)	Stated Annually	0-5	4	96 hours (2.5 weeks)	5-10	5	120 hours (3 weeks)	10-15	6	144 hours (3.5 weeks)	15 +	7	168 hours (4.2 weeks)
Years of Service	Semi-Monthly Accrual (hours)	Stated Annually														
0-5	4	96 hours (2.5 weeks)														
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15 +	7	168 hours (4.2 weeks)														



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	Years of Service	Hours Per Week Hired to Work	Stated Annually
	0-5	20-29 hours = 2 hrs. semi-monthly 30-29 hours = 3 hrs. semi-monthly	48 hours 72 hours
	5-10	20-29 hours = 3 hrs. semi-monthly 30-29 hours = 4 hrs. semi-monthly	72 hours 96 hours
	10-15	20-29 hours = 4 hrs. semi-monthly 30-29 hours = 5 hrs. semi-monthly	96 hours 120 hours
	15+	20-29 hours = 5 hrs. semi-monthly 30-29 hours = 6 hrs. semi-monthly	120 hours 144 hours
Sick Leave	Eligible full-time employees accrue 4 hours per pay period (stated annually this is 12 days per year) of sick leave. Part-time employees will be granted 24 hours of sick leave upon date of hire and on January 1st of each year thereafter.		
Holidays	Sacramento Steps Forward observes 12 paid holidays per year for regular full-time employees and part-time employees working at least 20 hours per week. In addition, 2 Floating Holidays will be given to eligible employees each calendar year.		