Request for proposal

Compliments of Wipfli LLP

Updated September 2022

(Entity name)

Request for proposal for wage comparability study and compensation analysis

OR

Request for proposal for wage comparability study and compensation analysis,   
including a review of employee benefit offerings

Inquiries and proposals should be directed to:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Entity: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please consider sending your completed request for proposal (RFP) to Wipfli.

Direct the RFP to Brian Gaumont via email at [*gfpbd@wipfli.com*](mailto:gfpbd@wipfli.com) or via mail to:

Brian Gaumont

Wipfli LLP

2501 West Beltline Hwy., Suite 401

Madison, WI 53713

Table of contents

General information

1. Purpose
2. Who may respond
3. Bidder’s conference
4. Instructions on proposal submissions
   1. Closing submission date
   2. Inquiries
   3. Conditions of proposal
   4. Instructions to prospective contractors
   5. Proposal submissions
   6. Right to reject
   7. Presentations
   8. Notification of award
5. Description of entity

Specification schedule

1. Scope of services
2. Other service options
3. Delivery schedule
4. Pricing
5. Payment
6. Confidentiality

Technical qualifications

1. Understanding our needs
2. Understanding the scope of work
3. Understating our industry
4. Engagement team
5. Organization, size and structure
6. Approach to the engagement

Proposal evaluation

1. Nonresponsive proposals
2. Proposal evaluation
3. Review process

Appendix

1. Sample proposal evaluation

General information

1. Purpose

This request for proposal (RFP) is to contract for the development of a compensation program to give the *(entity name)* better control over salary expenditures and help maintain a proper balance in the relationship between pay levels and the relative value of jobs within *(entity name)* and the labor market.

1. Who may respond

Only qualified organizations with experience working with grant-funded programs may respond to this RFP.

1. Bidder’s conference

(Note: If the entity will be holding a bidder’s conference, the date, time, location and other information relating to the conference should be included in this section.)

1. Instructions on proposal submission
2. Closing submission date: Proposals must be submitted no later than 4:30 p.m. *(time zone)* on *(date).*
3. Inquiries: Inquiries concerning this RFP should be directed to (*name and telephone)*. Offerors may direct questions via email or phone or in-person meeting.
4. Conditions of proposal: All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the offeror and will not be reimbursed by *(entity name).*
5. Instructions to prospective contractors:

Your proposal should be addressed as follows:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Entity: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Proposal submissions: Proposals are due by 4:30 p.m. on *(enter proposal due date)*. It is the responsibility of the offeror to ensure that the proposal is received by *(entity name)* by the date and time specified. Late proposals will not be considered.
2. Electronic submission: Proposals can be submitted electronically to the following email address: *(entity email address)*.
3. Mailed submission: Proposals can be submitted by mail. Send *(enter # of copies)* copies to the address above. It is important that the offeror’s proposal be submitted in a sealed envelope clearly marked in the lower left-hand corner with the following information:

Request for proposal  
4:30 p.m. *(proposal due date)*   
Proposal for *(wage comparability study and compensation analysis or  
wage comparability study and compensation including a review of employee benefit offerings)*

1. Right to reject: *(Entity name)* reserves the right to reject any and all proposals received in response to this RFP. A contract for the accepted proposal will be based on the factors described in this RFP.
2. Presentations: At the discretion of *(entity name)*, offerors submitting proposals may be requested to make oral presentations as part of the evaluation process. Presentations may be delivered in person or via teleconference. Reasonable advance notice will be provided to selected offerors. Not all offerors submitting a proposal will be asked to participate in oral presentations.
3. Notification of award:
   1. It is expected that a decision about selection of the successful offeror will be made within *(#)* weeks of the closing date for the receipt of proposals.
   2. Upon conclusion of final negotiations with the successful offer, all offerors submitting proposals in response to this RFP will be informed, in writing, of the name of the successful offeror.
4. Description of entity

*(Entity name)* is a nonprofit organization that serves *(#)* counties in *(state(s))*. *(Entity name)* is a private, nonprofit corporation and has been determined to be exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. It is governed by a *(#)-*member volunteer board of directors. Administrative offices and all records are located at *(address).* Other offices are located throughout the *(geographic)* area.

*(Note to entity: Include a description of the compensation and benefits’ goals and objectives or philosophy. Mention any specific program or regulatory restrictions, if you are part of a union, and the last update to the wage comparability/benefits analysis.)*

*(Entity name)* has *(#)* full-time employees and *(#)* part-time employees, for a total of *(#)* employees.

*Include* ***if*** *organization is requesting an employee benefits review:*

The following is a list of current benefits offered to *(entity name)* employees*:*

* *(Paid time off)*
* *(Vacation time)*
* *(Sick time)*
* *(Health insurance)*
* *(Short-term disability insurance)*
* *(Long-term disability insurance)*
* *(Pension)*
* *(Retirement contributions)*
* *(Etc.)*
* *(Etc.)*
* *(Etc.)*

Specification schedule

1. Scope of services

*This part of the RFP should be customized to outline the services requested by the entity. Include only the services needed.*

Based upon our needs, and the inclusion of approximately *(#)* unique job descriptions that we updated as of *(date)*, we request the following scope and approach:

* Hold a project kick-off call to discuss *(entity name)* process and approach, answer questions, identify any concerns with current compensation practices, explore various compensation philosophies to support *(entity name)* goals and objectives.
* Request information about *(entity name)* to provide an understanding of the positions, organizational structure, compensation philosophy, and current compensation structure.
* Coach and mentor *(entity name)* project team throughout the project to enhance understanding and experience in working with compensation and related tools.
* Compensation philosophy *(Note to entity: select one below)*
  + Provide a draft of a formal compensation philosophy for consideration if one does not currently exist.

**Or**

* + Facilitate customizing the compensation philosophy to reflect specific goals and objectives.
* Use the existing job descriptions as the basis for the analysis. It is important that the job descriptions are an accurate reflection of roles and responsibilities.
* Internal equity analysis *(Note to entity: select one below)*
  + Conduct an independent internal equity analysis for each position using the point factor method to determine the relative value of each position. Offeror to review preliminary findings with *(entity name)* and make adjustments as necessary to reflect internal conditions and finalize.

**OR**

* + Provide internal equity analysis training and tools so that the point factor analysis method can be used to define organizational value of each position. Offeror to provide a high-level review of findings, assist *(entity name)* with making adjustments as necessary to reflect internal conditions and finalize.

**OR**

* + Provide a refresher training on conducting an internal equity analysis (if needed) so that the point factor analysis method defines organizational value to each position. Offeror to provide a high-level review of findings and assist *(entity name)* with making adjustments as necessary to reflect internal conditions and finalize.
* Conduct a competitive pay analysis using market salary data to determine external pay equity of the positions in the study/analysis utilizing the job descriptions *(entity name)* provides. Create a competitive pay analysis worksheet for each benchmark position.
* Base compensation structure: *(Note to entity: select one below)*
  + Update the current base compensation structure following widely accepted compensation methodology using the competitive pay analysis worksheets to group similarly valued jobs. Propose pay ranges based on internal and external equity considerations. Pay ranges will be comprised of a series of overlapping ranges with an established minimum, midpoint and maximum. Review with you to determine the most appropriate structure via virtual conference or similar format. Modify as appropriate to finalize.

**OR**

* + Develop a base compensation structure following widely accepted compensation methodology using the competitive pay analysis worksheets to group similarly valued jobs. Propose pay ranges based on internal and external equity considerations. Pay ranges will be comprised of a series of overlapping ranges with an established minimum, midpoint and maximum. Review with you to determine the most appropriate structure via virtual conference or similar format. Modify as appropriate to finalize.
* Perform a comparative ratio analysis to illustrate impact to employees and evaluate how current pay practices align with the newly established ranges. Identify budgetary implications of bringing all employees within range.
* Evaluate and discuss positions and/or employees falling outside of the established ranges, wage compression, and other potential concerns. Explore options for responding to these situations.
* Conduct a wage compression analysis to release compression using key wage differentiation metrics important to *(entity name)*. For example, performance or length of service. Identify budgetary implications of releasing compression.
* Administrative compensation manual template (Note to entity: select one below)
  + Provide an administrative compensation manual template with sample guidelines and procedures that can be customized by (entity name).

**Or**

* + Assist (entity name) with customizing an administrative compensation manual template.

**Or**

* + Review and update the existing administrative compensation manual with current guidelines and procedures.
* *(Note to entity: Include if a review of employee benefit offerings is requested)* Utilize published reputable benefits survey data to provide a high-level review of benefit offerings and summary of market trends. Illustrate opportunities to modify and/or enhance benefit offerings to remain competitive in the market.
* Prepare a written report summarizing our process, findings, recommendations and resulting documentation.
* Present the final report to *(entity name)* and other select stakeholders upon request. This presentation should include an overview of your process, findings, recommendations and resulting documentation. We anticipate this presentation to be held virtually and to be held within two weeks of the final report being issued.

1. Other service options

At the discretion of *(entity name)*,this engagement can be extended to include bids for the following additional services. *(Note to entity: List the services you would like to have quoted separately from the compensation services.)*

* Fair Labor Standards Act (FLSA) exemption status review
* Job description updates, including title consolidation
* Human resources department review
* Organizational structure assessment
* Talent assessment
* Succession planning
* Change management
* Strategic planning

1. Delivery schedule

The offeror is to transmit one copy of the draft report to *(entity name)*’s executive director *(or other appropriate title)*. The draft report is due on *(date).*

*If needed,* the offeror shall deliver *(#)* final reports to *(entity name)* no later than *(date)*.

1. Pricing

The offeror’s proposed price for services should include a not-to-exceed total fee. Any out-of-pocket expenses should also be indicated.

1. Payment

Payment terms will be agreed upon with the offeror.

1. Confidentiality

The offeror agrees to keep the information related to all contracts in strict confidence. Other than the reports submitted to *(entity name)*, the offeror agrees not to publish, reproduce or otherwise divulge such information in whole or in part, in any manner or form, or authorize or permit others to do so, taking such reasonable measures as are necessary to restrict access to the information, while in the offeror’s possession, to those employees on the offeror’s staff who must have the information on a “need to know” basis.

The offeror agrees to immediately notify, in writing, *(entity name)*’s authorized representative in the event the offeror determines or has reason to suspect a breach of this requirement.

Technical qualifications

The offeror, in its proposal, shall, as a minimum, include the following:

1. Understanding our needs

The offeror should describe the current challenges and opportunities specific to our organization. Offeror to describe how they are best suited to assist our organization in facing those challenges and opportunities moving forward.

1. Understanding the scope of work

The offeror should clearly describe the scope of work to be performed in alignment with this RFP.

1. Understanding our industry

The offeror should describe its understanding of our industry by providing specific industry knowledge and expertise, including:

1. Prior experience working with nonprofit organizations.
2. Prior experience consulting with organizations similar to *(entity name)*.
3. Prior experience providing other services to organizations similar to *(entity name)*.
4. Engagement team

The offeror should briefly describe the qualifications of staff to be assigned to the engagement. Descriptions should include:

1. Consulting team makeup.
2. Prior experience of the individual team members; team bios should include education and position
3. Organization, size and structure

The offeror should describe its organization, size (in relation to work to be performed) and structure. Description should include:

1. Size of the offeror, including number of employees.
2. Explanation of independence.
3. Any conflicts of interest that exist.
4. Approach to the engagement

The offeror should describe its approach to the work to be performed.

Proposal evaluation

1. Nonresponsive proposals

Proposals may be judged nonresponsive and removed from further consideration if any of the following occur:

1. The proposal is not received in a timely manner in accordance with the terms of this RFP.
2. The proposal is not adequate to form a judgment by the reviewers that the proposed undertaking would comply with requested work.
3. Proposal evaluation

Evaluation of each proposal will be scored on the following six factors.

Point range

1. Understanding our needs 0-5
   1. Understanding our current challenges and opportunities
   2. Offeror’s approach to addressing our challenges
2. Understanding our industry 0-20
   1. Prior experience working with nonprofit organizations
   2. Prior experience consulting with organizations similar to *(entity name)*
   3. Prior experience providing other services to organizations similar to *(entity name)*
3. Organization, size and structure of offeror 0-5
   1. Adequate size of the offeror
   2. Expertise within the nonprofit sector
4. Qualifications of staff to be assigned to be performed. 0-20  
   This will be determined from resumes/professional profiles submitted.
5. Offeror’s approach to the engagement 0-30
   1. Uses comprehensive methodology
   2. Utilizes diverse set of data sources
   3. Leverages local, regional and national compensation information
   4. Aligns market rates more specifically to (entity name)
   5. Collaborates with key leadership to achieve the desired outcomes
   6. Creates realistic engagement timetable
6. Price 0-20

Maximum points 100

1. Review process

*(Entity name)* may, at its discretion, request presentations by or meetings with any or all offerors to clarify or negotiate modifications to the offerors’ proposals.

However, *(entity name)* reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the offeror can propose.

*(Entity name)* contemplates award of the contract to the responsible offeror with the highest total points.

Appendix

A. Sample proposal evaluation

Total points will be calculated from each board member, providing a total point value for each responding offeror. The offeror, meeting all of the outlined criteria, that also accumulates the highest total point value will be awarded the contract.

|  |  |  |  |
| --- | --- | --- | --- |
| Proposal evaluation | |  |  |
|  | | Point range | Points earned |
| Understanding our needs | | **0-5** |  |
|  | Understanding our current challenges and opportunities |  |  | |
|  | Offeror’s approach to addressing our challenges |  |  | |
|  | |  |  |
| Understanding our industry | | **0-20** |  |
|  | Prior experience working with nonprofit organizations |  |  | |
|  | Prior experience and consulting with organizations similar to *(entity name)* |  |  | |
|  | Prior experience providing additional services to organizations similar to *(entity name)* |  |  | |
|  | |  |  |
| Organization, size and structure of offeror | | **0-5** |  |
|  | Adequate size of the offeror |  |  | |
|  | Expertise with nonprofit sector |  |  | |
|  | |  |  |
| Qualifications of staff to be assigned to the project | | **0-20** |  |
|  | Experience of the individual consulting team members |  |  | |
|  | |  |  |
| Offeror’s approach to the engagement | | **0-30** |  |
|  | Comprehensive methodology  Utilizes diverse set of data sources  Leverages local, regional and national compensation information  Aligns market rates more specifically to (entity name)  Collaborates with key leadership to achieve the desired outcomes |  |  | |
|  | Realistic timetable |  |  | |
|  | |  |  |
| Price | | **0-20** |  | |
|  | |  |  |
| Total points | | ***0-100*** |  |

THANK YOU for your RFP!

Do you know Wipfli offers more than just this requested service? Wipfli provides products and services specifically for nonprofit organizations. Our specialists are ready to help your organization with:

Audit and tax

Keep your budget and finances balanced

Outsourced services

Finance and technology experience by your side, but not on your payroll

Online subscription services

Stay up to date on important compliance changes and get access to our specialists

Consulting

Consulting in HR, IT, leadership and operations

Tools to keep you compliant

Policy and procedure manuals you can customize for your organization

Training

More than 120 topics available through on-site, webinar and on-demand training

Visit us online at [**wipfli.com/ngp**](http://wipfli.com/ngp) or call **888 876 4992**

****

wipfli.com/ngp

888 876 4992