Request for Information

HR, Payroll & Learning Solutions

May 2019

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**SECTION A: CONTEXT**

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# Introduction

The purpose of this document and Request for Information (RFI) is for Midland Heart to gain an understanding and appreciation of what the market can provide in terms of solutions to manage HR, Payroll and Learning services. The information from this exercise will be used to inform our solution provision. This RFI document outlines a number of key questions Midland Heart would like to obtain feedback on from the market.

Midland Heart understands that a single partner may not be able to support ALL components of HR, Payroll and Learning and welcomes specialists to respond, based on their area of expertise.

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# Disclaimer and conditions

No information contained in this RFI, or in any communication made between Midland Heart and any Responder in connection with this RFI, shall be relied upon as constituting a contract, agreement or representation that any contract will necessarily be offered.

Midland Heart reserves the right, subject to compliance with the Regulations, to change without notice the basis of, or the procedures for, the competitive tendering process or to terminate the process at any time.

Under no circumstances shall Midland Heart incur any liability in respect of this RFI or any supporting documentation and Midland Heart will not reimburse any costs incurred by Responders or potential Responders in connection with preparation and/or submission of their responses to this RFI.

# Background

Our mission is to be ‘a leading housing organisation, delivering homes and services across the Midlands that enables people to live independently’.

Midland Heart has a strong legacy and culture of adapting to change. We continue to remain focused on our charitable aims which will be fulfilled by:

* being a top class landlord;
* building primarily affordable and social rented properties; and
* being a great employer

We own and manage 33,000 homes in over 50 Local Authority areas, for 70,000 customers. Our customer and financial performance is sector leading. Our turnover in 2017/18 was £194m with an operating margin of c40%. In 2018 we had 1,188 FTEs. This number will change as the scope of the organisation changes. The majority of our workforce operate out in the field.

In April we launched our new corporate plan for 2019-2024 called “Making What Matters Brilliant” which has five strategic areas of focus:

* **People Focused**
* Investing in Homes
* Safe & Strong
* Service First
* Growth & Partnerships

The people focused element includes:

* Positioning us as an exemplar employer in the Midlands
* Enabling people to perform at their very best
* A total rewards strategy that attracts, recognises and retains the very best people
* Growing our talent, particularly leadership capability
* Having a diverse, open & collaborative culture

A key element to support the delivery of being People Focused, is the implementation of a new HR, Payroll and Learning solution(s) which aims to deliver ease of access, self-service and scalability, you will find more information about this below.

# Our current service

Midland Heart has an in-house People Services team comprising of:

* Talent Management – talent attraction, acquisition, diversity, development and learning
* HR Operations – business partnering, employee relations case management, shared services, rewards & benefits, pensions, payroll, engagement and well being

Midland Heart currently uses Resource Link (provided by Zellis) as their core HR solution, and runs a part managed payroll solution, provided by Zellis. The Working Manager is used as their learning management solution. Managers and colleagues are able to access information and transact some processes using self-service. In addition to these key solutions, the team manages some processes offline using tools such as Excel, Word and Outlook.

# Why we are undertaking a soft market testing exercise

Following the launch of a new corporate plan the complexity and size of our business, including our workforce, is changing. A key aim of our new corporate plan is to become an employer of choice across our geography; using our employer brand to attract, recruit, develop and grow talent. Over the next five years, we plan to make record investments in the services we offer our customers (to become a top class landlord), our properties and our people. Our digital transformation is already underway with the launch of new customer apps and investment in big data solutions. We want to ensure we have the right solutions in place to support the People Focused strategy; delivering an adaptable solution which provides a greater degree of self service, enables a changing business environment, supports a changing reward and benefits portfolio and with the capacity to underpin smart working. We aim to:

* Have a reputation as a leading, inclusive and rewarding employer that people aspire to work for
* Ensure our colleagues are engaged with the work we do and the differences we make
* Grow our people so that they choose to stay and build a career with us

We want to empower our people and managers to have greater control with increased self-service and reporting, supported by streamlined and automated transactional processes. We require powerful and intuitive mobile functionality to promote modern and smart ways of working.

As part of the corporate plan delivery, we are seeking replacement of solutions for Core HR, Payroll and Learning. The information gathered as part of this soft market test will input directly to the outline business case for the future service. The business case aims to:

* Deliver *intuitive, self-serve* solution(s) that require minimal training to use and meet the expectations of a digitally enabled, emerging workforce, reducing dependencies on key individuals in the people services team and improving speed at which colleagues can self-serve.
* Deliver a *holistic, accurate* 360° view of colleagues for end users, managers and the People Services teams, without the need to manually collate or store data in multiple sources, or for colleagues to log into multiple systems.
* Deliver *efficiencies*- to reduce the amount of manual re-work required to transfer information between disparate systems, so that data remains *accurate* and overhead costs are reduced (support staff ratios).
* Deliver *standardisation* of processes which will underpin and enable people focussed strategy. *Adopting* modern ways of working (solutions), rather than adapting solutions to fit existing processes
* Extend *accessibility* of solutions by ensuring they are truly mobile enabled and can be accessed from non-corporate devices, so that users can access them, when they are outside of the office and process requests easily
* Deliver *scaleable*solutions - to ensure solutions can support increased numbers without impacting performance. Solutions need to adapt to allow for divestment as well as support expansion and support people in multiple posts
* Deliver *data* *accuracy* through a single source of the truth so that data across systems is integrated and can be relied upon. Resulting in improved *reporting,*including the accuracy and availability of reports for all levels and move towards more dynamic, self-serve reporting solutions. A key driver for improved reporting is to support resource planning and budgeting and compliance KPIs, and ensure solutions integrate with Midland Heart’s corporate BI solutions. Integration to third party applications will be a key driver for success.
* Support learning and *development* of our colleagues by providing solutions that are specific to role/area, cater for different learning styles, and link development to reward and recognition
* Review *payroll*solutions to determine best option for Midland Heart and ensures all colleagues are paid accurately and on time
* Work with *partners* who understand and can support Midland Heart’s corporate objectives by working collaboratively together and ensuring Midland Heart leverages on-going development. Partners must be responsive and flexible to Midland Heart’s needs and be focused on continuous improvement of their solutions

The aim of this Request for Information is to:

* Determine and understand the market interest to deliver these solutions. Midland Heart understands that a single partner may not be able support ALL components of HR, Payroll and Learning and welcomes specialists to respond based on their area of expertise.
* Understand how the service/s could be potentially delivered and managed in order to support them achieve the project objectives
* Understand the different costing models available.

In particular, we are seeking to understand the user experience and interested in the link between intuitive systems used appropriately by all employees and the accuracy of management information.

# Instructions for Respondents

The RFI is issued solely for the purpose of conducting market engagement and does not constitute any commitment by Midland Heart to undertake any procurement exercise in the future. This exercise includes no element of supplier evaluation. No parties will be prejudiced by any response or failure to respond to this questionnaire, there is no commitment of any kind involved on either side.

This RFI does not constitute a call for competition to procure any services and Midland Heart is not bound by any proposal offered. Midland Heart is also not liable for any costs, fees or expenses incurred by any party in its response to this soft market testing questionnaire.

# RFI Timetable

Midland Heart intends to conduct the RFI according to the following timetable so far as is reasonable and practicable:

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| Event | Date |
| Issue RFI | 23rd May 2019 |
| RFI Questions to be submitted by | 4th June 2019 |
| RFI Response to questions from Midland Heart | 7th June 2019 |
| RFI Submission | 4pm 14th June 2019  |
| Meet the Buyer Event (provisional date) | 1-4pm - 20th June 2019  |

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# Clarification Questions & Submissions

Clarification questions relating to the Request for information or the submission of proposals should be submitted in writing, quoting the RFI title to the Head of Procurement at Rachael.james@midlandheart.org.uk.

Midland Heart will collate all questions relating to the Request for information and respond to all parties as per the timetable.

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# Points of contact

All enquires in relation to the RFI and document submissions should be made via Midland Heart’s email address and communications must be headed as **HR, Payroll and Learning RFI** and sent to **Rachael.james@midlandheart.org.uk**

All enquiries and expressions of interest to attend the Meet the Buyer event should be made to Kerry Adams via the Project Support email address and communications must be headed as HR, Payroll and Learning MTB Event and sent to projectsupport@midlandheart.org.uk

*Please note invites to the event will be subject to receipt of the RFI by the deadline detailed above, however, the presentation and minutes will be published on the website shortly after the event taking place.*

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# Format of Response

Responses can be provided in your own preferred format, with a 1,000-word limit for each of the questions set out below.

Response should be completed in English and in pounds sterling.

Responses must be received by 4pm -14th June and sent to **Rachael.james@midlandheart.org.uk**

Key Questions

Midland Heart would like you to answer the following questions:

**Organisation Details**

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| * + 1. **Organisation name and address:**
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| **1.1.2 Registered company name and address (if applicable):** |
|  |
| **1.1.3 Name of relevant division or department and address:** |
|  |
| **1.1.4 Contacts:**Please provide relevant contact names, telephone and email addresses. |
| **Name** | **Appointment/ responsibilities** | **Telephone number** | **Email address** |
|  |  |  |  |
|  |  |  |  |
| **1.1.5 Company registration number** |

**Solution Provision Questions**

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| **Interest**Midland Heart is considering seeking a commercial partner(s) to deliver HR, payroll and learning solutions, with improved employee and manager access to self-serve. HR, Learning & Development will continue to be delivered in house and payroll models will be reviewed. The commercial partner would be responsible for data migration from existing providers to the new solution.  |
| 1 | What is/are your delivery model/s for the solution/s listed above? Do you deliver all yourself? Or deliver with an integrated partner? Or can you provide a dedicated solution for one/part of these? If multiple providers are core to your solution it would be helpful to understand account and contract management.  |
| 2 | Please provide examples of customer experience and/or customer satisfaction metrics which demonstrate you have successfully delivered these solutions for similar organisations (in terms of both the number of employees and the nature of work).  |
| 3 | Please indicate if you would be interested in attending a meet the buyer presentation and Q&A meeting with Midland Heart. Please note attendance will be limited to those who respond to this RFI in full (*provisional date for meeting is 20th June).* |

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| **Innovation in delivery**Midland Heart’s 5 year Corporate Plan is focused on making investments in the services we offer colleagues. We want to make Midland Heart a truly great place to work, as a leading, inclusive and rewarding employer that people aspire to work for, and where they can build and develop their careers. The transformation journey will be completed over a period of time and involve elements of process re-design, therefore we need to ensure solutions we procure are flexible and adaptable, and in line with any upcoming regulatory changes.  |
| 4 | How could your proposed delivery model/s help us meet the changing expectations of the business as we transform how we work?  |
| 5 | Please provide examples of how you have delivered innovative, intuitive ways of working that have delivered, and continue to deliver, efficiencies for your customers.  |

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| **Commercial Aspects**Midland Heart will be seeking a contract that provides the appropriate level of certainty for the organisation as we deliver our Corporate Plan. Our initial thoughts are to contract for an initial term of 3 years with the option to extend for up to a further 2 years. |
| 6 | What is your view of the proposed length of service contract? What alternative length of contract, if any, would you suggest? |
| 7 | Please provide an overview of your pricing model/s, factoring in our need for flexibility. |
| 8. | Based on the information provided, for an organisation of this size (1,188 FTEs) and based on your experience, can you provide indicative costs for a) implementation (including data migration) and b) annual running costs? (Midland Heart appreciate this is an estimate and is intended as a guide; we are happy to accept high level estimates at this stage.)  |
| 9.  | What impact would a significant increased number of employees have on the pricing model? |

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| **Transition and Data migration**A smooth and effective transition between providers is essential. For us it is critical that the data migration from our existing providers to a new partner is managed effectively with minimal impact on the business.  |
| 10. | Please provide an example of a transition and implementation plan including your view on testing and parallel running of payroll.  |
| 11. | Please set out resources, by role type and effort that you would provide during transition and what would be expected from Midland Heart.  |
| 12. | Please set out, at a high level, your process and approach for data migration. What assurances can you provide that your data migration procedure is well-established and efficient? |
| 13 | What level of input would you typically require from a) Midland Heart and b) the incumbent service providers to facilitate the process? |
| 14 | What lessons have you learnt from the implementation and migration of data into your delivery model that ensures risks are managed effectively? |

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| **Integration**Midland Heart will continue to work with additional partner solutions, who will continue to support any new HR, Payroll and Learning solutions, such as Rewards partners and corporate reporting solutions. For us it is critical these existing solutions can seamlessly integrate to any new providers |
| 16. | Please provide examples of how your solutions can integrate with third party applications in an innovative, efficient way. What options are available? What assurances can you provide that your integration solutions are well-established and efficient?  |
| 17.  | What level of input would you typically require from the third party application provider to facilitate the integration process? |
| 18. | What lessons have you learnt from the implementation of integrations that ensures risks are managed effectively? |

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