



**Massachusetts Housing Finance Agency**

**One Beacon Street  
Boston, MA 02108**

**REQUEST FOR PROPOSAL  
FOR  
HUMAN RESOURCES INFORMATION SYSTEM (HRIS)**

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## I. STATEMENT OF PURPOSE

MassHousing is requesting proposals pursuant to this Request for Proposals (“RFP”) for a Human Resources Information System (HRIS) solution that can best support our organization’s strategic, operational, and compliance needs. The purpose of this HRIS is to streamline and integrate core HR functions, including employee data management, payroll, benefits administration, time and attendance, talent acquisition, performance management, compensation management, onboarding, and offboarding. The selected HRIS solution should improve efficiency, ensure compliance with federal and state regulations, provide reliable reporting and analytics, and deliver a positive, user-friendly experience for employees, managers, and the Human Resources team. MassHousing intends to enter into a contract with the selected HRIS solution.

## II. BACKGROUND

MassHousing is an independent, self-funded agency created in 1966 to confront the Commonwealth's housing challenges. The Agency provides financing to low- and moderate-income homebuyers and homeowners, and to developers who build or preserve rental housing. As a mission-driven agency, MassHousing uses housing finance to strengthen communities, to help people build economic prosperity, and to expand homeownership.

Since its inception, MassHousing has provided more than \$30 billion to support homeownership and rental housing opportunities across Massachusetts.

### Key Business Areas

- MassHousing works with a network of lender partners to provide loans to low-and moderate-income homebuyers. The Agency’s **home ownership programs** have helped more than 90,000 people to buy homes. The Agency also helps homeowners stay in their homes through (MIF) its mortgage insurance fund, which includes job-loss protection.
- The **rental lending** business has produced or preserved more than 91,000 rental units. MassHousing is a full-service financial institution employing underwriters, architects, attorneys and asset managers who work closely with multi-family development partners.
- MassHousing has several programs that intersect both homeownership and rental lending including the **Massachusetts Community Climate Bank (MCCB)**, which offers products to assist residential buildings in adopting clean energy and **Strategic Community Investments (SCI)**, which provides grants and technical assistance to support community-based local housing goals and to finance small-and-mid-sized housing.

For more information, visit [www.masshousing.com](http://www.masshousing.com).

## III. SCOPE OF WORK

A detailed Scope of Work is provided as a separate attachment to this RFP (Attachment A: Scope of Work). Please review it carefully and ensure your proposal address all requirements.

#### **IV. CONTENT OF PROPOSALS**

This RFP is designed to elicit all information considered essential to evaluating each proposal. There is no intent to limit the content of the proposals. Respondents may include such additional information as may be appropriate, or offer alternate solutions, but should not exclude any information requested in this RFP.

All proposals should contain the following information:

##### **A. Transmittal Letter/Firm Description/Executive Summary**

Proposals must be accompanied with a transmittal letter on company stationery or letterhead and signed by an individual legally authorized to bind the company. The transmittal letter should identify the individual(s) involved in preparing the proposal, as well as a single point of contact for the company. The transmittal should contain or be accompanied by a detailed description of the firm (including background on the firm's financial stability) as well as a summary of the contents of the proposal.

MassHousing is an equal opportunity employer and seeks to provide procurement, contracting and employment opportunities for all. It is MassHousing's mission to confront the housing challenges facing the Commonwealth to improve the lives of its people. The Commonwealth faces an unprecedented challenge in housing supply and seeks to expand the affordable housing delivery system. We encourage responses from entities which describe strategies to actively promote and recruit vendors, workers, and contractors that have not previously had access to such opportunities. Responses that describe the benefits of direct, specific, and measurable access to employment and contracting opportunities created by the proposed project will be favorably reviewed.

##### **B. Experience and Qualifications**

Proposals should describe the relevant experience of the firm and of the key personnel that will be providing the services. Relevant experience includes not only services similar to those being sought by MassHousing but also any past experience with entities similar to MassHousing.

##### **C. Culture and Values**

In support of MassHousing's longstanding commitment to confront the housing challenges facing the Commonwealth to improve the lives of its people, MassHousing will prioritize organizations who align with the Agency's mission and values.

Please provide the following information about your organization's culture and values.

##### **Your Company**

1. Describe your own organization's activities that reflect your commitment to equal opportunity and fairness, and the impact, if any, it has on your organization's competitive position.

2. Provide a summary of your organization's leadership and governance structure, including how your leadership team and board composition reflect or support the broader goals of your organization.
3. Describe how your employees engage in volunteerism, community service, or charitable efforts. Include any organizational support or recognition for such involvement.
4. Share any partnerships or collaborations your organization maintains with local businesses, local nonprofits, public agencies, or community-based organizations aligned with housing, economic development, or social impact.
5. Outline any sustainability or environmental stewardship policies your organization follows (e.g., energy-efficient practices, green construction, environmental certifications).
6. Highlight any measurable impacts your organization has had in promoting positive social or community outcomes, including client feedback, external recognitions, or internal reporting processes.

### **Your Vendors/Consultants/Suppliers**

1. Describe any strategies you employ to expand the number and/or variety of vendors you utilize in your own business.
2. Provide a breakdown of your ten largest categories of vendor, consultant, or supplier purchases over the past three years. For each category, include:
  - Total dollar amount or percentage of spend
  - Percentage of vendors that represent first-time engagements

Example:

| Category | Total \$ / % Spend | % First-Time Engagements |
|----------|--------------------|--------------------------|
| Example  | \$500,000 / 15%    | 40%                      |

3. Identify any spending goals, new partnerships, underutilized and/or underrepresented vendors or procurement strategies your organization is pursuing to increase opportunities for new or underutilized vendors, consultants, or suppliers.

### **D. References**

Please provide a list of at least three (3) companies that MassHousing can contact as references for which the respondent has provided similar services within the past three years, including:

1. Name, address, phone number and website address of each company.
2. General description of the engagement; and

3. Contact name and telephone number(s) of those who can talk knowledgeably about their experience with the respondent and any system issues that arose during the implementation of their project.

#### **E. Project Plan**

Provide a step-by-step project plan for performing and completing the solicited services as described in our SOW. Your Project Plan should include:

1. Key personnel and their roles in providing the service, including identification of a project manager that will be assigned to the implementation.
2. Your general approach and methodology in providing the services. You may provide suggestions or alternatives to any approach described in Attachment A as long you also respond to the described approach.
3. Details about project phases, including a list of deliverables, sign-off points, timelines, milestones, software components (if any), subcontractors, and training.
4. Expectations of MassHousing's staff to assist with the process.

#### **F. Support**

Please describe whether there is typically an on-going relationship with respondent and its clients after implementation. Please describe the way respondent communicates with clients after implementation, whether through industry-related newsletters published by respondent, continuing educational workshops, etc.

#### **G. Adverse Actions**

Please include a description of any insurance claim, criminal investigation or material litigation against your firm or members of your firm in the last ten (10) years, any instances in which your firm has been debarred by state or federal government and the circumstances for the debarment, as well as a summary of any formal complaints filed against your firm or members of your firm containing allegations of discrimination in the last ten (10) years.

#### **H. Conflicts of Interest**

Please describe any facts you are aware of that would result in a conflict of interest with MassHousing if a contract was awarded to your firm.

#### **I. Pricing**

Please provide a detailed pricing structure for delivering the services (use a matrix or chart if necessary).

## **V. METHOD OF SELECTION/AWARD**

### **A. Contract Award**

Contract will be awarded to the respondent whose proposal is determined to be the most advantageous to MassHousing, in its sole discretion, taking into account price and other evaluation criteria as set forth in this RFP.

MassHousing reserves the right to negotiate the terms of the contract(s), including the contract amount(s), with the selected respondent prior to entering into a contract. The contents of the respondent's proposal and this RFP, and any amendments thereto, shall become contractual obligations if an engagement of services ensues. Contract selections should be distinguished from a contract award. Contracts will not be considered awarded until negotiation of terms is final. Failure of a successful respondent to accept these obligations in contractual agreement may result in cancellation of a respondent's selection. If contract negotiations cannot be concluded successfully with any selected respondent(s), MassHousing may, in its sole discretion, negotiate a contract with the next ranked respondent.

One or more contracts may be awarded as a result of proposals submitted in response to this RFP. MassHousing reserves the right to award contracts for individual deliverables if that is advantageous to MassHousing.

### **B. Evaluation of Proposals**

Proposals submitted in accordance with this RFP will be evaluated by a selection committee composed of MassHousing staff. All respondents will be notified of the outcome of the review of their proposal. Proposals will be evaluated pursuant to the following criteria:

- Responsiveness to requirements of RFP
- Financial and organizational stability of respondent
- Understanding of proposed scope of services and approach in addressing MassHousing's specific needs and objectives
- Quality and timeliness of proposed work plan
- Technical capabilities (in terms of personnel, equipment, and materials) and management plan (including staffing of key positions, method of assigning work, and procedures for maintaining level of service
- Alignment of Culture and Values
- Demonstrated experience and qualifications of respondent and respondent's staff assigned to perform the solicited services
- Ability to provide a cost-effective solution to meet the needs of MassHousing; and
- Demonstrated successful past performance based on references.

## **VI. SCHEDULE AND INSTRUCTIONS**

### **A. Proposals and Due Dates**

All proposals must be submitted electronically by **5:00 PM Eastern Time on 14 November 2025**. Please email your response to **Jennifer Buss** at [hr.rfpsubmissions@masshousing.com](mailto:hr.rfpsubmissions@masshousing.com).

Late submissions may, at MassHousing's discretion, be rejected. **Please note that hard copy submissions will not be accepted and will be returned without review.**

### **B. Summary Project Timetable**

Following initial review of the proposals, MassHousing will identify those respondents it elects to interview. Interviews will be scheduled within the three (3) weeks after the response deadline and MassHousing will attempt to provide respondents with at least one week's notice before scheduling an interview.

The anticipated timetable for the evaluation process and subsequent project activities are summarized below:

| <u>Date</u>      | <u>Task</u>                                                   |
|------------------|---------------------------------------------------------------|
| 20 October 2025  | Distribute RFP                                                |
| 21 October 2025  | RFP Response Period Begins                                    |
| N/A              | Bidders Conference Date and Link if applicable                |
| 14 November 2025 | RFP Response Deadline                                         |
| 21 November 2025 | RFP Evaluation and Selection of Candidates for Further Review |
| 15 December 2025 | Complete Follow-up and Reference Calls                        |
| 30 December 2025 | Final Selection                                               |

This anticipated timetable is for reference purposes only and is subject to change at MassHousing's sole discretion. A copy of this RFP, as well as any addenda thereto, will be posted on [www.masshousing.com/rfp](http://www.masshousing.com/rfp). Schedule changes and/or other RFP revisions, including date, time, and place changes, if any, will be posted on the website on a weekly basis. In addition, after the RFP Response Deadline, changes may be sent directly to Respondents at the contact information provided.

### **C. Single Point of Contact**

All inquiries, communications, and requests for clarification regarding this Request for Proposals (RFP) must be submitted via email only to the following Single Point of Contact (SPOC):

**Jennifer Buss**  
**Senior Director of Human Resources**  
**MassHousing**  
**Email: [hr.rfpsubmissions@masshousing.com](mailto:hr.rfpsubmissions@masshousing.com)**

In order to maintain a fair and impartial competitive process, MassHousing will only answer questions or comments regarding the RFP that are submitted in accordance with the terms of this section. MassHousing will determine, in its sole discretion, whether any inquiry requires a formal response which, if required, may take the form of an addendum to this RFP. Respondents who initiate private communications with other MassHousing personnel regarding material issues involving this RFP may be disqualified.

**D. Bidder's Conference**

A Discovery & Insight Packet (Attachment B) is provided in lieu of a bidder's conference. This packet includes the key insights and organizational context normally presented during a conference session and is intended to ensure that all bidders have equal access to background information relevant to this RFP.

**VII. ADDITIONAL PROVISIONS**

**A. Confidentiality**

By accepting to respond to this RFP, respondent expressly acknowledges that MassHousing's business procedures, ideas, inventions, plans, financial data, contents of this RFP, and other MassHousing information are the sole and exclusive property of MassHousing. The Respondent also agrees that it will safeguard such information to the same extent it safeguards its own confidential material or data relating to its own business information that is of a confidential or proprietary nature. Federal and state laws require that MassHousing maintain an information security program to protect certain personal information related to individuals who are customers, business partners, vendors, or employees of MassHousing. This information includes the following: (1) nonpublic personal information protected by the Safeguards Rule of the Gramm-Leach-Bliley Act (15 U.S.C. § 6801 et. seq.) and implementing regulations (16 C.F.R. Part 314); consumer reports protected under the federal Fair Credit Reporting Act, as amended by the 2004 FACT Act (15 U.S.C. § 1681 et. seq.); and any other information pertaining to individuals subject to data security, data security breach notification, and identity theft prevention laws. If MassHousing grants respondent access to its networks or otherwise allows respondent to view personal information related to individuals who are customers, business partners, vendors, or employees of MassHousing, respondent shall comply with all federal and state laws protecting such information while working at MassHousing's facility, while using MassHousing's protected information, and while connected to MassHousing's network. It is MassHousing's policy to employ the services of outside investigative agencies to conduct background checks on individuals with access to its networks. In submitting its proposal, respondent acknowledges that it will be required to submit to such background checks of its impacted employees at MassHousing's request. If awarded the contract, respondent shall comply with MassHousing's information security program by (1) implementing and maintaining measures designed to meet the information

security objectives of federal and state laws; (2) using and disclosing customer information solely for the purposes of performing the contract; and (3) providing MassHousing with copies of the results of any internal and external audits or tests of the effectiveness of MassHousing's information security measures.

## **B. Non-Discrimination**

In connection with the performance of work under this contract, the respondent agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, disability, sex, marital status, familial status, sexual orientation, gender identity or expression, pregnancy, genetic information, veteran status, alienage or citizenship status, ancestry, national origin, or any other characteristic protected by applicable federal, state, or local laws. This provision shall include, but not be limited to the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. The respondent further agrees to take all action necessary to ensure equal employment opportunities in compliance with applicable federal, state, and local law. The respondent agrees to post in conspicuous places, available for employees and applicants for employment, notices setting forth the provisions of the nondiscrimination clause.

## **C. Rights of MassHousing**

MassHousing is soliciting competitive proposals pursuant to a determination that such a process best serves the interests of MassHousing and not because of any legal requirement to do so. MassHousing accordingly reserves the right to accept any proposal; to withdraw or cancel this RFP; to modify or amend, with the consent of the proponent, any proposal prior to acceptance; to reject any or all proposals or waive any informality and otherwise to affect any agreement that MassHousing in its sole judgment, deems to be in its best interest.

## **D. Use of Respondent Proposal**

All material submitted becomes the property of MassHousing and will not be returned. If the respondent intends to submit confidential or proprietary information as part of the proposal, any limits on the use or distribution of that material should be clearly delineated in writing. Respondent should be aware that MassHousing is a quasi-public governmental agency subject to Massachusetts General Laws, Chapter 66, sections 1-18, therefore, any information submitted to MassHousing (even if marked as confidential or proprietary) may be subject to disclosure under the Massachusetts Public Records Law.

MassHousing reserves the unrestricted right to copy and disseminate the respondent materials for internal review.

## **E. Respondent Proposal Costs**

All respondent proposal related costs, including but not limited to, proposal preparation and presentation, system demonstrations, documentation, site visits, in-depth briefing for

MassHousing, and negotiation meetings are entirely the responsibility of the respondent and shall not be chargeable in any manner to MassHousing. MassHousing will bear the costs of sending its own staff to respondent headquarters and respondent client sites if such meetings are required.

## **ATTACHMENT A: SCOPE OF WORK**

The following section contains detailed questions designed to assess how well your solution meets MassHousing's needs. Responses should be clear and complete so we may accurately evaluate your system. Please provide a narrative description of your product(s) and/or service(s) with respect to each of the following categories and respond to the questions under each respective category. For questions that can be answered "yes" or "no," please include an explanation or elaboration to provide context and clarity regarding your system's capabilities.

### **Implementation**

- What is your process for effectively managing the implementation process?
- What is your typical estimated time frame for completing initial implementation of the system?
- What experience does your implementation team have?
- Can you describe your business model of using remote and/or on-site implementation experts, and explain why you use this model?
- Describe the makeup of your typical implementation team.
- What are your expectations in terms of client resources?
- What would be the role of MassHousing's IT team? During initial implementation, deployment, and for on-going maintenance and support?
- How will our account be managed following implementation?
- Will MassHousing IT need to support the system after deployment? If yes, what key skills and level of experience would be required?
- MassHousing expects to own all custom code and other artifacts (documents, diagrams, media) produced for this project and necessary to run the site. Do you anticipate using any assets proprietary to your company or in any other way restricted that MassHousing would not have rights to, or which MassHousing would need to license?
- What is your approach to data conversion?
- Describe how you would approach implementation with poor or missing data.
- How much history can be imported into the system?
- Is there a migration tool from test to production or are changes manually made in both places?
- Describe your issues management approach and plan.
- Describe your approach to identifying, managing, mitigating, and tracking of project risks. Provide a sample risk mitigation plan.

### **Cybersecurity**

- Do you carry Cyber Insurance? If yes, does your policy cover damages to partners or clients caused by your cyber incident, are subcontractors or downstream vendors covered under your policy, and have you ever filed a claim related to a third-party incident? (What was the outcome?)
- Do you conduct or engage a third party to conduct vulnerability scans, penetration testing, and/or security audits of your systems? If yes, when was the last time each of these was conducted?
- Do you perform background checks on staff, including full-time, part-time, and independent contractors?
- What is your Security Awareness program/training for people who will be working with MassHousing or MassHousing data?

- Infrastructure
- Platform
- Code
- Data
- Network
- Edge
- Physical

- Does the system transfer demographic data upon hire to HR module?
- Is the system able to connect and post through online job boards like Indeed? Are any preconfigured?
- Does the system allow administrators to create, delete, and modify the application templates and application questions?
- Is there an ability to send mass communications to applicants through system?
- Can administrators create and customize email triggers based on actions (candidate status changes, offer letters, interviews, etc.)?
- Does the system allow administrators to define qualifying questions and, if so, will the system automatically reject ineligible candidates?
- Does the system automatically extract and organize key information from resumes? (resume parser)
- Does the system provide government compliant EEO questionnaires for candidate tracking?
- Does the system have anti-biased/inclusivity tools for resumes and job descriptions/postings?
- Does the solution track candidate/applicant evaluations, such as permitting interviewers to enter notes, or providing questionnaires about necessary job skills?
- Does the system have the ability to search resumes by keywords?
- Does the system have an AI-based candidate rating tool that matches the candidates to the qualifications of the role? (scorecard, match card, etc.)
- Does the system provide analytics and reporting capabilities for time-to-fill, demographics, candidate source, current open roles/status, breakdown by department, etc.?
- Does the system provide reporting on where applicants are in the recruitment process (application review, hiring etc.)?
- Does the system generate customized offer letters/packets?
- Can the system submit or create a general application or profile for future consideration?
- Can the system manage multiple openings for the same role?
- Does the system allow for an internal job board to post requisitions separately from the external job board?
- Can candidates view the job board/career page on a mobile device without compromising utility?
- Does the system have the ability to parse resumes and allow candidates to attach resumes?
- Once hired, describe the process and ease of moving candidate profile data from the external candidate profile to the new employee profile.
- Does the system have a filtering functionality and ease of search for open positions by department, function, location, etc.?

### **Onboarding**

- Provide an overview of onboarding, detailing the user experience from recruiting to hiring to onboarding
- Does the system provide onboarding checklists that can be tailored? If so, can those pre-onboarding tasks be assigned in advance?
- Does the system offer e-sign submission, print capabilities, and additional uploads as attachments?
- Describe how we can track the process as new hires complete the onboarding process.
- How does the system enable us to include content-rich learning items such videos, documents, and welcome/departure messages?

- Does the system include I-9 Verification?
- Does the system have the ability to restrict access to employees and their onboarding documents based on user role?
- Does the system contain a library of forms used for data collection and retain copies of forms completed by employees during onboarding?
- Does the system have the ability to assign onboarding forms by employee type?
- Can new hires be transitioned seamlessly into HR/Payroll after the onboarding is complete?
- Are new hires able to complete onboarding tasks before their start date?

### **Position Management**

- Please provide a brief overview of how positions are managed in the system.
- Does the system track status of position approvals?
- Does the system maintain jobs across multiple departments, geographical locations, companies, divisions, and other structural distinctions?
- Does the system track all job-specific data (job grades, job families, salary, reports to, etc.)?
- Does the system create/manage jobs and job details?
- Is the system capable of producing jobs/positions reports?

### **Human Resource Management**

- Is there a built-in review process so that any self-service changes to data can be approved by an administrator before being committed to the system?
- What alerts/notifications are available for certifications or licenses expiring, new policy acknowledgement, etc.?
- Can the system support mass notifications?
- Describe how the software facilitates the maintenance of employee data and creation of employee history (status changes, promotions, demotions, transfers, etc.)
- Describe any self-service capabilities that allow address, banking information, and personal information updates
- Describe the system's ability to search employees by employee number, name, company, location, status, job, pay group, department number, etc.

### **Document Management**

- Describe the availability of a documents library.
- Does the system offer a way to store documents in a secure location with flexible search options and associated workflows?
- Does the searchable documents library include medical documents/sick notes?
- How does the system support electronic signatures?

### **Payroll**

- Please provide an overview description of the payroll system, including information about quarterly tax filing, W-2 processing, and other year-end activities.
- Does the payroll system offer end-to-end payroll processing with the ability to calculate gross-to-net, pay employees, make adjustments or retroactive payments, and perform tax filing?
- Are rules for premium pay (overtime, double time, etc.) fully configurable?

- Can the system process termination checks and maintain the original check date while recording payroll costs and taxes at a later date?
- Can the system recoup or recover overpaid wages?
- Does the system handle fringe allocations for deductions?
- Does the solution support varying pay cycles?
- Can payroll be run on our own schedule, including last-minute changes, without added fees? Please explain.
- Does the system support seamless salary adjustments and retro pay calculations, including processing based on an effective date?
- Does the system provide employee self-service for updating direct deposit and tax withholdings, as well as for viewing current and historical pay statements?
- Does the system issue paperless paychecks, W-2s, and pay statements?
- Does the system support the ability to print and distribute live checks when needed?
- How are paper checks processed and printed locally and remotely?
- What secure printing environments and configurations are recommended?
- What printer brands and models are supported, and what is the recommended process for replacing a local printer?
- What paper check layout options are available (standard, blank, or custom)?
- If custom layouts are supported, who are the approved suppliers and what delivery options are available?
- How are check signatures stored and secured?
- What processing or delivery limitations and cutoff times apply for local and remote printing?
- Does the system track historical pay information?
- Does the system provide total compensation statements?
- Does the system provide timely legislative update pushes?
- Does the system calculate garnishments based on state and federal requirements?
- Does the system support (calculate, track, and report) both statutory payroll taxes (federal, state, local, and unemployment) and workers' compensation tracking or integration to ensure complete coverage?
- Is payroll regulatory reporting available?
- Does the system integrate seamlessly with the timekeeping system for importing hours?
- Does the system have out-of-the-box integration with accounting software?
- Does the system provide standard and custom reporting capabilities?
- Does the system automate payroll G/L journal entries?
- Are automatic direct deposits possible for each payroll?
- How are electronic payments processed and transmitted?
- How are direct deposit payments maintained for federal, state, and local government entities, benefits providers, and employee direct deposits?
- When are payments released after a payroll batch is submitted or finalized?
- Does the provider process all payments on the company's behalf, or does the company initiate transfers to corresponding accounts?
- Which financial institutions are used or partnered with to process electronic payments?
- Does the system allow the setup of company holidays that may differ from standard calendar holidays?
- Does the system track year-to-date, quarter-to-date, month-to-date, and last payroll amounts by earning type and by employee?

- Does the system support an unlimited number of earning definitions? If limited, please describe.
- Does the system include a gross-up calculator?
- Does the system support effective dating for deductions?
- Is dedicated customer support available for payroll processing questions and needs?

### **Time and Attendance (timecards)**

- Please describe the Time and Attendance module.
- Does the system allow for Managers and Employees to view and approve timesheets daily/weekly/biweekly?
- Is this module accessible via all mobile devices?
- Capability to view time details on a weekly, biweekly, monthly, annual, or selectable rolling calendar.
- How are schedules created and when can the employees see them?
- Does the system allow the ability to pre-populate employee time for a biweekly pay period?
- Does the system offer employee self service capabilities to request time off in advance, cancel time off requests, and manually edit timecard to include PTO hours as needed?
- Can the system apply separate OT rules to employees who work different jobs?
- Does the system allow for flexible reporting & analytics on labor and OT?
- Describe the audit functionality to review time and user details for approvals, edits to timecard, etc.
- Does the system enable both the user and HR to enter time?
- Does the system have the ability to assign approvers and reviewers?
- Does the system allow for viewing employee attendance data for a defined period?
- Does the system have the ability to revise timesheet (and all timesheet fields) after timesheet period?
- Does the system allow managers to view/approve requests for edits and time off? Can the system require comments to identify reasons for time sheet changes?
- Does the system have automatic notifications to remind employees and supervisors to finish/approve time sheets based on a client configured deadline?
- Can time records be locked from further edits?
- Does the system support an unlimited number of pay codes and pay categories for tracking employee time?
- Can Managers/supervisors view all their employees' time and attendance records on a single screen for the entire pay period without the need to scroll between days of the week and/or employee?
- Are there warnings or highlighted areas for Managers to easily see when something is out of the ordinary for an employee's time sheet?
- How is time approved? What workflows and levels of approval are supported?
- Does the system flag timecard errors, such as missed entries, and allow managers to easily identify and resolve exceptions?
- Are employees able to view company and statutory holidays on their schedule in the system? If so, how?
- Does the system allow employees to view any changes made to their timecard?

### **Time Off**

- Does the system have paid and unpaid time off tracking?
- How does the system handle multiple types of PTO including Vacation, Sick, Personal, etc.?
- Does the system handle automated accruals with the ability to create different profiles/policies based on full time status and/or start date?
- How do employees request time off? Are there self-service capabilities and will it include time-off balance tracking in real time and projected dates?
- Will managers have access to balances when reviewing requests?
- How do managers review PTO requests?
- Does the system provide users with onscreen alerting if a time off request exceeds the employee's available balance prior to submission?
- Provides configurable rules for minimum balance allowed.
- Provides configurable workflow for time off approvals.
- Provides alerting capabilities to notify approver of pending time off requests.

### **Leaves of Absence**

- Does the system support compliance with state-mandated paid leave programs?
- Does the system create and manage leave cases based on specific leave eligibility criteria and rules, including FMLA, PFML, STD, and similar programs?
- Does the system provide automated workflows and reminder notifications for key events such as form completions and return to work dates?
- Does the system integrate with timecards to streamline time tracking and reporting?
- Does the system provide reporting capabilities for leave of absence time tracking?

### **Compensation Management**

- Provide an overview of the key compensation features of the system.
- Does the system incorporate performance results into your compensation plans?
- Does the system automatically calculate the merit increases for the manager if they enter in a dollar amount and, conversely, if they enter in the % it calculates the dollar amount?
- Is the system capable of allowing managers to create a compensation budget and submit proposed increases for employees as part of performance management timeline?
- Does the system allow for a configurable and flexible approval process for compensation plans?
- Does the system automatically calculate the managers' budget totals, used, and remaining across their team?
- Does the system support Super Approvers and what approval functions can they perform for others?
- Does the system have the ability to support rollup of cascading budgets and display team budget summaries (i.e., percent of budget utilized)?
- Does the system support multiple payout periods and off cycle compensation?
- Does the system create a document to notify employees of new changes to their title, base salary, variable pay, etc.?
- Does the system provide an online view of the employee's total compensation package including retirement, benefits, perks, bonuses and incentives?
- Provides budget worksheets to assist managers in compensation planning.

- The solution facilitates an automated process for increases and enables administration of employee base salaries and hourly pay salary change workflows.
- Is compensation fully integrated with the HRIS and payroll functions?
- Explain how the system calculates, displays, and reports comp-ratio and/or quartile information.
- Does the system have reporting capabilities as part of the compensation increase process?

### **Benefits**

- How does the system handle benefits administration?
- Explain how the system facilitates reporting to third party vendors such as benefit providers.
- Does the system offer and support online benefit open enrollment? (Paperless OE)
- Does the system offer employees a Total Compensation Benefit statement?
- Does the benefit data automatically populate in payroll?
- Does the system provide standard ACA compliance reporting, including the ability to create 1095c and 1094c forms?
- Does the system have a module to maintain Worker's Compensation Claims, Costs, tracking lost time, restrictions, legal reporting requirements, regular reporting, etc.?
- Does the system filter for plan dependencies? For example, will the system provide HSA options only when an HDHP plan is elected?
- Can the system calculate benefit eligible wages differently for each plan?
- Does the system provide functions to define rate, calculation, and deduction rules for each benefit program and plan?
- Can the user/administrator track and view enrollment status online? Describe available on-screen tools, dashboards, reports, etc.
- Are cost calculations for all employee options visible to the employee on the enrollment screen?
- Does the system include defined start and stop dates for benefit/deduction?
- Does the system provide configurable life events to automatically notify employees of the ability to make changes to their benefits enrollment outside the standard open enrollment period?
- Does the system support life insurance imputed amount for both viewing by employee and payroll processing?
- Can the system be configured to automatically terminate employee coverage based on plan rules?
- In the case of pending documents, can the system hold those benefit transactions until approval while releasing other approved transactions? For example, if an employee elects life insurance at enrollment which is over the Guarantee Issue, can the system "pend" this subject to EOI approval while releasing the medical election?
- Does the employee have the ability to make changes to benefits throughout the year?
- Are employee HSA deductions direct deposited automatically each time payroll is processed into the employee HSA bank account?

### **Performance Management**

- Does the system offer an online performance management system?
- If so, does the performance management process include goal setting, feedback gathering, employee self-assessments, supervisor review, and sign off?

- Does the system allow for continuous feedback? Can the feedback be accessed outside the performance review?
- Does the system provide a Talent Dashboard with a summary view of pay and performance for their team?
- Does system allow for 360/periodic reviews?
- Does the system allow managers and employees to select a rating from a predetermined rating scale?
- Does the system have the ability to complete performance improvement plans, assign to an employee, and track the completion of action items throughout the process?
- Describe how feedback can be collected at the end of each project and how that feedback is brought into the employee's annual review.
- Does the system enable administrators to assign different review forms for different employees within the same review cycle?
- Does the system have the ability to attach documents to a performance review (e.g. emails, communications, notes, etc.)?
- Is there a section to enter employee performance review information, including comments and dates?
- Can the system track different levels of performance management (30-60-90-day questionnaires, PIPs, etc.)?
- Does the system support the ability for users to assign/align development goals to organizational goals?
- Does the system support a variety of goal formats?
- Does the system track historical performance for an employee, a supervisor's reports, or other hierarchy segmentation
- Does the system permit sign-off and acknowledgement capability for both manager and employee?
- Does the system have the ability to download and print performance reviews and create custom reporting based on content included in reviews?
- Does the system link between performance management and compensation for seamless processing of compensation increases?

### **Offboarding**

- Describe how the system supports a structured offboarding process, including task assignment, notifications, and tracking of completion.
- Does the system provide checklists and forms for offboarding that can be tailored by employee type, location, or role?
- Can exit interviews (surveys or forms) be distributed, collected, and stored within the system?
- Can managers and HR track status of offboarding deliverables (e.g., return of company property, benefit continuation notices)?
- Does the system contain a library of forms used for data collection and retain copies of forms completed by employees during offboarding?
- Does the system provide templates for departure communications (to the employee, manager, IT, payroll, security)?
- Does the system allow reporting on reasons for termination and trends in offboarding data (voluntary vs. involuntary, tenure, department, etc.)?

- Can the system provide employees with a portal or package of information during offboarding (e.g., COBRA, retirement account access, transition resources)?

### **Analytics and Reporting**

- Does the system provide ad hoc report writing and modification? Please describe available capabilities.
- Does the system provide dashboards? Please provide examples.
- Describe any analytics tools available with the system.
- Describe how a non-technical user can obtain reports from the system without assistance.
- Does the system have the ability to pull reports listing employees on leave, types of leave, etc. for accurate leave tracking? Please describe.
- Is the system capable of producing historical reports relating to items including, but not limited to, job title, pay, employee status, etc.? If no, Does the system generate reports based solely on current employee data?
- Do reports automatically expire?
- Provides access to unlimited years of check and schedule history.

### **Customer Support**

- Describe your service model.
- How much professional experience do your service teams have?
- How is progress and/or success measured for the service team?
- What specialist support do you provide for technical, payroll and tax questions?
- Are client support services available via IM?
- What client communications do you provide to clients?
- Provide an overview of your approach to training clients.

## ATTACHMENT B: DISCOVERY & INSIGHT PACKET

As MassHousing (the Agency) approaches its 60th anniversary in 2026, it is also coming to the end of its current period of five-year business goals. Shortly after the last goals were introduced in 2020, the paradigm shifted. The world of work fundamentally changed in our new remote engagements, interest rates that had been at historic lows for over a decade increased rapidly, and the cost of housing, and most other things, escalated. Our new normal has been defined by unforeseen growth, increasing complexity, and regular disruption management.

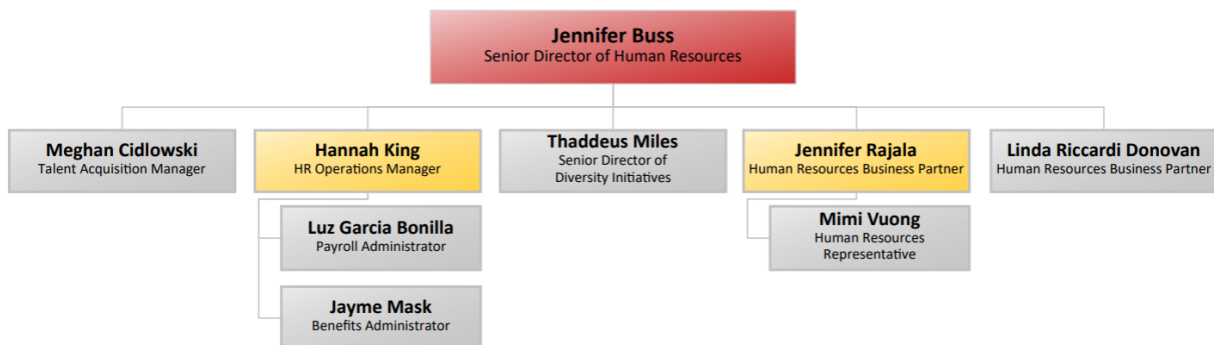
A new Human Resources Information System (HRIS) will strengthen the Agency's ability to fulfill [MassHousing's Mission](#) by creating a more efficient, data-driven, and responsive workforce infrastructure.

The system will:

- Enhance operational efficiency, allowing staff to spend less time on administrative tasks and more time on mission-critical work such as housing program delivery, policy development, and community engagement
- Improve workforce planning and analytics, giving leadership greater visibility into staffing needs, skills, and capacity across departments that support housing initiatives
- Support employee engagement and development, ensuring that the organization attracts, retains, and empowers a skilled and motivated workforce capable of driving innovative housing solutions
- Strengthen compliance and accountability, enabling accurate, transparent, and timely reporting aligned with the Agency's commitment to integrity and trust
- Modernize and unify systems, fostering collaboration across divisions and ensuring that HR processes keep pace with the Agency's evolving programs

### WHO WE ARE:

The Human Resources Team has nine team members, each of whom utilize our HR Information System (HRIS) on a regular basis in various ways. The team is outlined below.



### OUR CURRENT HRIS OVERVIEW AND FUTURE VISION:

The Agency's current HRIS, UKG Kronos, serves as the central platform for a broad range of human resources functions used by employees, managers, and HR staff. It supports the full

employee lifecycle and provides foundational tools for day-to-day operations, compliance, and reporting. The current system supports approximately 355 active staff members on payroll, including twenty-two employees in six states outside of our Massachusetts headquarters.

Current use of the HRIS includes, but is not limited to:

- **Talent Acquisition:** Employee referral submissions, intern activations, talent acquisition reporting, internal and external job postings, candidate communication, full-cycle recruiting stages, and internal position changes
- **Onboarding:** Coordination of new hire setup, document collection, and orientation tracking
- **Payroll:** Management of base compensation data, tax withholdings, timecard approvals, and headcount reporting
- **Benefits Administration:** Support for open enrollment, tuition assistance, ADA reasonable accommodation tracking, FMLA and PFML management, and COBRA reimbursements
- **General Operations:** Personal information updates, reporting line changes, and regulatory reporting
- **Offboarding:** Processing of employee separations, exit documentation, and related administrative updates

The Agency also maintains a Retirement System managed by a five (5) member board, where an Executive Secretary oversees the daily functions and activities of the system. Each pay period, data such as employee contributions, hours worked, wages, and demographic information are transmitted to the Retirement Plan Administrator to ensure accurate and timely plan management.

As the Agency modernizes its workforce systems, we are in search of an HRIS that delivers an exceptional user experience that supports not only internal HR functions, but also the needs of employees and managers who interact with the system. Our ideal solution will be able to deliver an intuitive user experience, simplify processes, improve accessibility, and provide consistent, responsive interactions across all devices and user types.

We look forward to proposals that build on this context and help advance our workforce systems to support the Agency's mission and goals.