



## **Greater Wisconsin Agency on Aging Resources (GWAAR)**

### **Request for Proposals (RFP)**

#### **Professional Employer Organization (PEO)**

#### **Introduction**

The Greater Wisconsin Agency on Aging Resources (GWAAR), Inc., is a nonprofit agency committed to supporting the successful delivery of aging programs and services in 70 counties and 11 tribes in Wisconsin. We provide Aging Lead Agencies in our service area with training, technical assistance, and advocacy to ensure the availability and quality of programs and services to meet the changing needs of older people in Wisconsin. To learn more about what GWAAR is and does, please visit our website at <https://gwaar.org/>.

GWAAR is a non-profit with 501c3 status. GWAAR has a total of 39 employees, including 36 full-time (26 salaried and 10 hourly employees) and 3 part-time hourly employees. Staff are located all over Wisconsin. In 2025, our total annual payroll was \$2,653,412.

#### **Purpose**

GWAAR is seeking competitive proposals from interested and qualified Professional Employer Organizations (PEO) to help us coordinate and deliver human resources, payroll, and employee fringe benefits services for our employees.

#### **RFP Overview**

GWAAR is issuing this RFP to identify and select one PEO to provide services.

The organization selected will be responsible for one or more of the following:

1. Human Resource (HR) Management  
HR consulting and support; employee handbook development and compliance with federal, state, and local employment laws.
2. Payroll Administration  
Bi-weekly payroll processing including direct deposit and pay cards; special payroll runs; accommodation of multiple departments; wage garnishments; payroll tax with-holding, filing and reporting (federal, state, and local); benefit premium deductions; W-2 preparation and distribution; time and attendance system integration and provision; and online access for employees to view pay stubs and tax forms.

3. Benefits Administration

Employee benefits plan administration including securing benefits; managing carrier relationships; processing enrollments, qualifying life events, and terminations; managing and providing education to employees on open enrollment; COBRA administration; IRS reporting; HIPAA and ACA compliance; non-discrimination testing.

GWAAR provides a full range of fringe benefits to include:

- Health Insurance
- Dental Insurance
- Vision Insurance
- Life Insurance
- Disability Insurance
- Supplemental Insurance (critical illness and accident)
- Property and Casualty Insurance
- Flex Health Benefit
- Flex Dependent Care Account
- Retirement – using vendor outside of current PEO
- Payment in lieu of Health Insurance
- Paid Time Off (PTO) – accrued based on seniority.
- Health Reimbursement Account (HRA) – using vendor outside of current PEO
- Paid Holidays
- Employee Assistance Program (EAP)

4. Worker's Compensation

Worker's compensation insurance coverage and claims management and administration.

5. Unemployment Insurance

Unemployment insurance administration, including calculation and remittance of premiums to applicable government agencies.

6. Technology and Human Resource Information Systems (HRIS)

Access to an HRIS platform, employee self-service portal, manager self-service portal, reporting capabilities, data security and privacy measures, file feed integration with benefit carriers.

The selected organization will provide the aforementioned services to all GWAAR employees per bi-weekly payroll for the duration of the contract period.

GWAAR sources employees for its agency through its own recruitment program and will not require assistance with talent acquisition.

## Eligible Proposers

An eligible proposer is any PEO legally authorized to conduct business in the State of Wisconsin. GWAAR will comply with all federal and state mandates governing contractor selection. To be considered for funding organizations must be able to document the following:

- Adequate financial resources or the ability to obtain them.
- The ability to meet RFP specifications at a reasonable cost.
- A satisfactory record of past performance.
- A satisfactory record of integrity, business ethics, and fiscal accountability.

## Contract Terms

The contract resulting from this RFP will be executed starting on January 1, 2027 and ending December 31, 2027. GWAAR reserves the right to extend the contract on an annual basis for two additional years based on need, performance, and available funding.

The award of any contract based on the proposals received in response to this RFP is contingent upon the receipt of adequate funding allocations.

## Technical Assistance

GWAAR welcomes questions about the RFP. Only written questions submitted by email will be accepted. Please submit questions to Megan Olsen, Human Resources & Benefits Liaison: [megan.olsen@gwaar.org](mailto:megan.olsen@gwaar.org) with 'PEO Services RFP' in the email subject line.

## Proposal Minimum Requirements and Submission Instructions

The proposer application is the primary mechanism used to determine the suitability of a proposer for funding. The review process includes the following steps:

**Technical Review:** To be considered for funding, the application must be completed in its entirety, in the prescribed format, and received by the deadline. Responses must be comprehensive. An evaluation committee will determine whether further consideration is warranted.

**Oral Interviews:** An evaluation committee will provide a preliminary analysis of the application. At the discretion of GWAAR, an oral interview may be conducted with the proposer for clarification on any points contained in the application or budget.

**Evaluation:** Proposals will be reviewed and ranked by the evaluation committee according to the how well the applicant met the criteria set forth in the RFP.

**Award Announcement:** The GWAAR Board of Directors will formally vote to select a contractor. The selected proposer will receive notice of the award.

### **Limitations**

This request for proposal does not commit GWAAR to award a contract or to pay any costs incurred by the proposer in the preparation of the response submission. GWAAR reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with all qualified sources, or to cancel this request for submission in part or in its entirety if it is in the best interest of GWAAR to do so. The award of any contract based on proposals received in response to this request is contingent upon the receipt of adequate funding allocations.

### **Grievance Procedure**

GWAAR subscribes to the policy of equal opportunity, and as such, maintains a formal grievance procedure to handle complaints of participants and service providers.



## Greater Wisconsin Agency on Aging Resources (GWAAR)

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#### Professional Employer Organization (PEO)

Applications must be received no later than 4:00 PM CDT on June 1, 2026. Response should be emailed to Megan Olsen, Human Resources & Benefits Liaison: [megan.olsen@gwaar.org](mailto:megan.olsen@gwaar.org).

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#### **Please include answers to the following information in your proposal.**

- Legal name of organization
- Address of organization
- Contact information for representative of organization
- Name of proposing organization (if different than legal name)
- Federal Employer Identification Number
- Signature of person who has signatory authority to sign the proposal
- Printed name and title of person who has signatory authority to sign the proposal

#### **Organizational History and Experience**

- Provide a description of your organization including its history, vision, and mission. **Limit 1 page.**
- Summarize your organization's experience over the past five years in delivering PEO services, including what differentiates you from your PEO competitors. **Limit 1 page.**
- Identify any federal or state funded or government partnerships or projects for which you have delivered PEO services.
- List any accreditations that your organization holds.

## **Service Delivery**

- Describe your organization's approach to customer service, employee education, and support.
- List a minimum of three (3) references that can attest to your ability to provide quality customer service.
- What platform(s) does your organization utilize that would be leveraged in the execution of this contract?
- What is your organization's capability for reports and analytics? Can reports be customized?
- How many individuals would be dedicated to support this project, during implementation as well as on an ongoing basis? What are their professional qualifications?
- Describe the policies and procedures your organization has in place to protect sensitive employee data and ensure compliance with data privacy regulations.
- What is your organization's approach to worker compensation claims management and cost containment?
- Describe in detail the benefit package that would be available to our employees.
- Provide information on the turnaround time for payroll processing (e.g., length of time from the end of the pay period to receipt of payment to employees).

## **Pricing**

- Provide detailed information regarding administrative fees, whether a percentage of gross payroll or a flat per-employee-per-check fee.
- Provide a breakdown of employer payroll taxes.
- Provide detailed information regarding workers compensation costs expressed as a rate per \$100 by job classification for common entry-level jobs.
- Provide detailed information on any additional set-up fees, whether for services or technology.
- Explain your pricing model and any factors that might cause it to change.
- Provide a sample of your invoice presentation.
- Provide a price breakout for each PEO service that your organization provides individually. Does your organization's pricing change if services are/are not bundled?
- Pricing to be quoted exclusive of taxes, as GWAAR is a tax-exempt organization. GWAAR will provide tax exemption documents upon request.