



PROCUREMENT DEPARTMENT

Teria G. Sheffield
Procurement Director

SOLICITATION TYPE: Request for Proposals

DATE:1/20/2023

ID Number: 2849

Title: Comprehensive Talent Management System
Software as a Service (SaaS)

Due Date/Time: March 7, 2023 at 11:00 a.m.

LATE SUBMITTALS WILL NOT BE ACCEPTED

Opening Location:

Government Center Building
Room 3401
6 S. Congress St., York, SC 29745

Point of Contact: Teria Sheffield, Procurement Director
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Questions Deadline: No later than February 27, 2023 at 4:00 p.m.

Tentative Date of Council Approval: April 3, 2023

PO Box 180, 6 South Congress Street, York, SC 29745
Telephone: 803-684-8520 Fax: 803-684-8580 Web: www.yorkcountygov.com

1.0 INTENT

1.1 York County is seeking sealed proposals from qualified firms to provide a turnkey software solution for the implementation, deployment, and ongoing support of a Comprehensive Talent Management System as a (SaaS) Product.

1.2 York County is seeking an experienced firm to provide a web-based automated talent management system that will deliver a consistent and comprehensive employee management lifecycle solution to include talent acquisition, onboarding, performance management, talent management, data and reporting platform, and learning and development.

1.3 It is York County's intent to describe in general terms, the services needed for a comprehensive talent management program. All parts, items, details of services or features not specifically mentioned which are regularly provided by the practice in order to complete this type of work/service shall be provided in response to this Request.

1.4 Responses to this RFP will be used to determine the relative qualifications of various firms to perform the scope of work and tasks specified. The County is seeking a proposing team with demonstrated expertise that meets the requirements of this RFP.

1.5 It is York County's intent to award a contract with an experienced provider to assist the County's Human Resources Department with the implementation of a new comprehensive Talent Management Software system **with an anticipated rollout date of August 1, 2023.**

1.6 It is anticipated that an agreement for services will be negotiated and executed between York County and the firm who is determined to best meet the needs of the County. All firms with an interest in working with York County are encouraged to review the County's website at www.yorkcountygov.com for additional information.

2.0 GENERAL TERMS AND CONDITIONS

2.1 This request contains, in general terms, the overall objectives of York County and in obtaining the professional services indicated herein. While an attempt is made to describe the general expectations of the County and the anticipated work to be performed, the County and the successful firm may need to define a more specific scope of work as part of a negotiation process. If it becomes necessary to revise any part of this request, written amendments will be provided in an addendum form to all potential proposing firms. Any inquiry or request for interpretation received five (5) or more days prior to the date fixed for opening of proposals will be given consideration unless an earlier date is specified on the cover page. All such changes or interpretations will be made in writing in the form of an addendum and, if issued, posted on the County's website www.yorkcountygov.com and will be mailed or sent by available means to all known prospective Offerors prior to the established RFP opening date. Each Offeror shall acknowledge receipt of such addenda in the space provided in the RFP document. In case any Offeror fails to acknowledge receipt of such addenda or addendum, the proposal will nevertheless be construed as though it had been received and acknowledged and the submission of the proposal will constitute acknowledgement of the receipt of same. Questions received less than five (5) days prior to the date for opening of proposals unless an earlier date is specified on the cover page may not be answered. Only questions answered by formal written Addenda will be binding. Oral and other interpretations or clarifications will be without legal effect.

2.2 Each Offeror providing a response for consideration by the County is responsible for obtaining information on the conditions and restrictions involved in meeting the obligations and providing the services as set forth in this RFP. The failure or omission of an Offeror to obtain adequate information will in no way relieve the Offeror of any obligation with respect to this RFP or to an associated contract.

2.3 York County reserves the right to retain all proposals submitted. Submission of proposal indicates acceptance by the Offeror of the conditions contained in this RFP, unless clearly and specifically noted in the proposal submitted and confirmed in any resulting contract between York County and the Offeror selected.

2.4 In submitting a properly signed Proposal, the firm accepts all of the terms and conditions contained in this request. Submitted Proposals shall remain open and if applicable, prices quoted shall be honored for a minimum of ninety (90) days after the day of the RFP opening.

2.5 There is no expressed or implied obligation for York County, or its agents to reimburse responding firms for any expenses incurred in preparing proposals in response to this request.

2.6 The successful firm shall have the full and sole responsibility for performing all services as finally agreed upon and accepted by the County. In the event the Offeror fails to deliver /or perform any proposed services within the specified schedule, the County reserves the right to cancel the Contract and secure other means of providing and deduct all costs thereof from any payment due the firm.

2.7 The successful firm shall not sell or use any data for other than intended Talent Management purposes.

2.8 Chain of Communication: To ensure the integrity of the competitive process, a strict chain of communication shall apply to each Invitation for Bids, Request for Proposals, Request for Qualifications, or any other competitive solicitation during the period between publication of the solicitation and final award. Offerors or its agents may not communicate by any means, directly or indirectly, with York County public officials, employees, its agents, or representatives or any person not otherwise listed on this document, regarding any aspect of this procurement activity. All communications must be solely with the Procurement Officer. In the sole determination of the Procurement Officer and/or York County, violation of these restrictions may result in disqualification of your offer, suspension or debarment, and may constitute a violation of law.

2.9 Prohibition of Donations and Gratuities: Offerors are restricted from making donations to any York County governmental entity with whom they have or seek to have a contract. The Offeror represents that his/her offer discloses any gifts made, directly or through an intermediary, by the Offeror or the Offeror's named subcontractors or subconsultants to or for the benefit of York County, its agents, or representatives during the period beginning eighteen months prior to the Opening Date. No Offeror, or any person, firm, or corporation employed by the Offeror in the performance of this request, may offer or give any gift, money or anything of value or any promise for future reward or compensation to any York County employee.

3.0 BACKGROUND INFORMATION

3.1 York County currently employs 1300+ full-time and 100 + part-time employees. The County's workforce is comprised of professional, administrative, managerial, clerical and technical staff. The classification and compensation plan currently include over 500 job descriptions and class

codes. Each position is given a specific grade level and salary range based on levels of responsibility, education and other requirements. All employees are classified as Exempt or Non-Exempt.

3.2 York County utilizes multiple internal systems and software platforms for payroll processing, timekeeping, employee self-service (ESS), performance management, applicant tracking, and onboarding. The County has been using its current platform offered by CivicHR since 2018 for its applicant tracking and onboarding functions. However, the current system does not integrate with various County internal systems and software platforms, thus making it challenging to maintain.

3.3 The County is seeking a comprehensive Talent Management System (TMS) to eliminate manual processes and improve efficiency. The ideal solution will provide a robust talent management system that captures the entire lifecycle of the employee to include talent acquisition, onboarding, performance management, talent management, data and reporting platform, and learning and development. This solicitation will primarily focus on talent acquisition, onboarding and performance management.

3.4 The desired outcome will be to simplify the talent acquisition process, eliminate manual processes and increase efficiency. Key components of this system must be user-friendly, easy to navigate and provide a first in class candidate experience. The selected vendor should facilitate a proven implementation process that includes integration, testing, training and ongoing software maintenance that will be completed in a timely manner.

3.5 As York County continues to grow, there is a need for a system that will grow with the County and have the capacity to be scaled to meet its strategic objectives. Additional modules and/or standalone products such as performance management, and/or learning and development may be considered under the same contract terms and conditions agreed upon between the Offeror and RFP. Those additional products/modules should be listed and priced separately in the RFP and, the County reserves the right to purchase individual products/modules throughout the lifecycle of the contract. However, this does not necessarily commit the County to purchasing all of the products/modules at the onset of the contract.

4.0 PROJECT INTENT

4.1 The intent of the Request for Proposals (RFP) is to receive a robust Talent Management ERP to accommodate key functions in human resources including applicant tracking, onboarding, performance management and learning management. The solution will be web-based and automated while maintaining access to historical records. Additionally, the County is seeking a provider that will be efficient, comprehensive and has the ability to scale as the County continues to grow.

4.2 The County anticipates full implementation of the new Talent Management Software system by October 16, 2023.

4.3 The proposed Talent Management (TM) service shall be specifically designed for government use in support of York County's ever-evolving workforce. The Talent Management service shall incorporate the latest TM theory and strategies available and must be easily upgradeable when improvements become available. The proposing Offerors shall consider the following goals that York County is attempting to achieve in this RFP:

- System flexibility

- System redundancy
- Systems ease of remote accessibility
- System flexible security and access levels

Project elements that the County will require proposals to include:

- Customization
- Accessibility
- Mobile-Friendly Platform
- Compliance and Efficiency
- Implementation
- System Maintenance
- Customer Support Services
- Comprehensive Training Options
- Data Security
- Chatbot Functionality

5.0 SCOPE OF WORK/SPECIFICATIONS

5.1 Features and Functionality

Each category below lists features and labels them as either *Mandatory* or *Preferred* as applicable. Mandatory features are the baseline requirements needed and the preferred features are identified to include ideal solutions.

- Platform must include a robust talent acquisition system to include a comprehensive data-driven platform, applicant tracking, onboarding, forms and email template storage, job description management, and performance evaluation and management.
- Must provide options, integrated or at an additional cost, to integrate with other software programs included, but not limited to Microsoft Office, SharePoint and Smart Fusion. Vendor must ensure that the platform remains current and operational through updates.
- All web user interfaces must be ADA compliant.
- The system will be a software as a solution service (SaaS) hosted by the vendor.
- All data transmitted in the system by applicants, employees, hiring managers and HR staff must be secure.
- Data must be encrypted while in transit, rest and in use.
- Ability to purge sensitive data in accordance with retention requirements.
- Ability to create reports on data being used and stored to allow the ability redact sensitive data.
- All onboarding documents that contain social security information or other confidential information must be encrypted. Needs to redact sensitive information when provided to hiring managers. Social Security numbers must be visible to HR staff.
- Browser-based platform.
- 24/7 customer support services to managers, administrators and end users.
- Ability to provide training/tips on each of the function areas of the modules for anyone to access for additional information.
- Accessibility to all historical records and a viable option to import current data.

5.2 Offerors shall provide a comprehensive proposal to include the following modules:

- ✓ **Applicant Tracking System:**
 - Career Page, Requisitioning, Online Job Posting, Application & Application Submission, Application Support Services, Recruitment – Applicant Tracking and Pipelining, Position Management and Reporting.
- ✓ **Onboarding**
- ✓ **Performance Management**
- ✓ **Learning Management and Employee Engagement**

5.3 APPLICANT TRACKING SYSTEM (ATS) MODULE

Intent

The County is seeking a solution that will provide a comprehensive automated web-based tool, which will provide efficiency and consistency in processes for all users; while providing a comprehensive streamlined process.

Career Page

- Ability to build multiple custom landing pages to attract talent.
- Ability to upload multiple document types including videos.
- Ability to be accessed on multiple browsers and mobile-friendly.
- Ensure that the career/employment opportunities page be ADA compliant and the option to manage languages in a drop-down function.

Requisitioning

Mandatory Functions

- Hiring manager and/or human resources staff can create job postings from a requisition or job description.
- Hiring managers/administrators can submit requisitions using a mobile device.
- Requisitions can be routed electronically for approvals (as needed).
- System has email workflow capability and the ability to create multiple templated emails that can be set up to send automatically.
- Job descriptions can be housed in the system as well as other documents.
- System tracks budgeted, authorized, filled and open positions using position control.
- Retention schedule is available to auto-archive requisitions.
- Ability to upload selection materials and assessments within the requisition.

Online Job Posting, Application & Application Submission

Mandatory Functions

- Provide an automated process for online job posting and printed versions of vacancy announcements.
- Provide a mobile application format that is compatible with mobile devices.
- Have multiple templates and/or options for posting jobs that HR may edit as needed.
- Import approved job descriptions into the job posting template.

- Ability to automatically create requisition numbers for new postings or enter manual numbers.
- Allow identification and reporting types of jobs posted (Regular, Part-Time, Full-Time, Intern).
- Allow closed postings to be edited and reposted per the department/HR's discretion.
- Option for postings to have automatic close dates and times; as well as the ability to set up automatic notifications sent to applicants/hiring managers regarding status.
- Allow customization of each application form at HR's discretion to include: addition free form supplemental questions to the application that may be specific to that posting.
- Option to designate "required" fields ensuring a hard stop if the supplemental question is required and must be answered by the applicant to submit their application.
- Allow multiple documents to be uploaded in various formats.
- Allow applicants to view open job opportunities without logging in or creating a user profile; ensure job postings can be viewed using a mobile device.
- Ensure security of applicants' personally identifiable information is protected. Ensure security of applicants' personally identifiable information is protected. Ability to perform redactions. We should not require the storage of personally identifiable information for non-employees. Additionally, personally identifiable information should be encrypted and a permission structure should give us the ability to limit who sees that information.
- System provides an automated seamless process for posting positions.
- Able to choose internal only or internal/external.
- Job postings can be set up on a retention /archive schedule.
- HR can automatically set up recruitment sites where all posted positions are advertised automatically.
- Managers have the ability to track where they are in the recruitment process in their own dashboard.
- System utilizes online authenticated e-signatures.
- Standard disaster recovery processes are in place.
- System allows for uploading organization's brand and graphics.
- System has the ability to allow candidates to self-schedule their interviews and communicate directly with the administrators.
- System has the capability to blind out personally identifiable information on the application. For example, name, education, address, salary, etc.
- Option to set up automatic notifications and updates when positions are posted that applicants self-select (notify me).
- Have the ability for applicants to apply for multiple positions without having to complete several applications.
- Make information such as the number of positions an applicant has applied for be unavailable to managers to avoid any bias.
- Ensure that applications can be customizable to meet the needs of the specific position (for example – internships vs. full-time positions).
- Ability to automate the collection of candidate information.
- Capacity to expand your candidate sourcing options.
- Process vacancy requests, with the ability to merge new vacancies into existing pools.
- Ability to post evergreen/pooled positions with multiple vacancies associated with a single posting.
- Ability to add and/or set-up managers/reviewers to the requisitions/job postings as needed.

Manager Capabilities

- Provide a mobile-friendly portal that allows administrators/hiring managers to log in easily from their smartphone and receive push notifications when an action is needed or when candidates apply for their positions.

Preferred Functions

- System should be compatible with the most common browsers such as Edge, Chrome, or Firefox with a possible addition to Safari.
- Option to have notes sections to store information on the specific posting.
- The ability to automatically populate saved job postings in the system to post to avoid manual uploading.
- The ability to post our job postings in multiple languages and/or have the option to click a dropdown menu that will translate the job posting automatically.
- Have a chatbot function with automated responses for FAQ's from candidates that integrates with the system to boost candidate engagement.
- The ability to capture current job postings and have them transferred to our job line for applicants without computer/mobile device access.
- Provides automated template messages to apply when responding to applicants throughout the application process.

Application Support Services

- User-friendly ticketing system and produce resolutions per service level agreements.
- The vendor should enhance and/or add new fields, updates and functionality as requested in the application as needed by the end users.
- Application support should be efficient and respond quickly to user needs/issues.
- Real-time system outage information.
- 24/7 customer service support for applicants, end users, and other stakeholders.
- Rapid response time for resolving open tickets.

Recruitment: Applicant Tracking and Pipelining

Mandatory Functions

- Provide an equitable, efficient and mobile friendly / user-friendly process for applicants.
- Provide tools for recruiters, administrators, and managers to screen and refer applications for posted positions quickly and effectively.
- Ability for recruiters, administrators, managers to shortlist talent and/or rank talent.
- Be user-friendly and intuitive for all users (internal and external).
- Provide training as needed to utilize the functions depending on user.
- Allow the creation of and use of applicant questionnaires and scored assessments.
- Allow applicants to be tagged for system generated notifications or emails they elect based on their job preferences.
- Ability to select multiple applicants and send bulk emails. This capability should be available for all users (HR, recruiters, managers, etc.).
- Ability to auto refer all applications per the request of the hiring manager.
- Systematically identifies internal applicants that fit upcoming job openings.

Applicant / Candidate Capabilities

- The applicant should have a user- friendly experience when using this system. It should be easy for the applicant to save their application information; access the careers page to view open positions; ability to update their resume information if they have more than one resume; and upload all documentation electronically.
- Require applicants to create a user profile and password to start and apply.
- Ability to start and stop an application and complete it at a later time without losing information.
- Store all application information entered including uploaded attachments to ensure its accessible and available for use in future applications. Needs to be done securely.
- Allow applicants to view the status – received your application, application is under review, selected to interview, verbal offer made, onboarding, etc. for all positions they have applied for.
- Ability to check on their applications and make edits at any time.

Recruiter/HR/Administrator Capabilities

- Ability to store each job applicant's job application history so that it can be reviewed by both the HR and the applicant.
- Ability to have automated and templated emails to hiring managers on questionnaire responses and assessment results.
- Include automated ways to determine if the minimum requirements are met (scoring system option).
- Have the ability to create applicant profiles based on positions they have applied for, add notes, and track for future positions.
- Have applicant search capabilities including "keyword" search for applications and/or skill sets.
- Ability to track key statistical data and metrics on time to fill, vacancies rate, etc. at every stage of the selection process.
- Ability to track recruitment sources for the applicants and hires.
- System dashboards that have the ability to visualize real time vacancy fill rate and vacancies over time; and conversion rates/processing time at each stage of the recruitment, selection and onboarding stage.
- Minimize and/or eliminate duplicate applicants.

Position Management

Mandatory Functions

- Provide an efficient and user-friendly position description form for each position.
- Allow customization of the position description form, including format and additional fields.
- Have ADA compliant position descriptions allowing for the designation of essential duties.
- Ability to archive position descriptions.
- Allow for easy editing, updating and electronic sharing of the position description form.
- Capture history edits and updates.
- Transfer information stored on the position description easily into the job requisition.

Reporting

Mandatory Functions

- Vacancy rates, cost per hire, and time to fill reporting / dashboards to easily access data and metrics.
- View and track pending separations.
- Track candidate responses and onboarding.
- Track applications where candidates withdraw.
- Track adverse actions.
- Track pass through rates and assessment scoring.
- EEO voluntary entries for federal reporting.
- Easy-to use reporting tools and customizable report functions.
- Candidate sourcing and recruitment tracking.
- Standard report export formats are supported (CSV, XLS and/or PDF).
- Reports are mobile device-friendly.
- System allows for the use of the Online Consent Agreement.
- Reports can be updated/saved and others can access these reports as needed.

5.4 ONBOARDING MODULE

Intent

The County is seeking a solution that will provide a comprehensive automated web-based tool, which will provide efficiency and consistency in processes for all users; while providing a comprehensive streamlined process.

Mandatory Functions

- Ability to assign managers/admin staff to complete onboarding steps, notifications and allow the set-up of onboarding task completion.
- Seamlessly sync new hire information from recruitment to onboarding to eliminate duplicative steps.
- Onboarding function that is user and mobile-friendly.
- Onboarding function must also be able to send out reminders using text messaging as an option.
- System onboarding capabilities including online offer letters, electronic new hire information and documents to ensure that new hires have everything they need for the first day.
- Create and manage all onboarding forms electronically for completion.
- Provide new hires customized learning/training activity that need to be completed within a certain timeframe based on their position.
- Provide new hires with online and training activities (both mandatory and non-mandatory).
- Ability to have a repository of documents, policies, guidelines, forms, etc. that can be managed and edited.
- Allow for E-Verify to be completed within the system.
- Has the ability to generate reports to determine complete and incomplete new hire forms for Human Resources.

- Provide capacity for both the new hire and hiring manager to track where they are in the onboarding process.
- Provide capacity for the hiring manager to send emails directly through the system to the candidate to engage new hires.
- Allow capability to customize emails to new hires based on department/position.
- Have the ability to download and print onboarding documents as needed.
- Provide a mobile-friendly portal that allow to log in easily from their smartphone and receive push notifications when an action is needed.
- Have an onboarding checklist (workflows) to support the readiness of equipment, email set-up, employee identification, offer letter acceptance, policy review and acknowledgement, I-9 verification, etc.
- E-form capability with authenticated e-signatures.
- Push notifications (email and text options) to the manager that the candidate has completed processes or has pending items to complete.
- Push notifications (email and text options) to the new hire to remind them of pending onboarding tasks.
- Allows administrators to create and modify form templates for communications without vendor intervention.
- Ability to partner with vendor(s) who provides services of performing background checks, credit checks, employment verification, education verification and/or scheduling pre-employment drug screens and/or CDL physicals.
- Seamless integration with vendors who provide pre-employment screenings to ensure efficiency in our onboarding processes.

Preferred Functions

- Has an off-boarding workflow/function to allow new hires to access onboarding check lists with the first 90 days.

5.5 PERFORMANCE MANAGEMENT MODULE

Intent

The County is seeking a solution that will provide a comprehensive automated web-based tool, which will provide efficiency and consistency in processes for all users; while providing a comprehensive streamlined employee performance evaluation process.

Mandatory Functions

- Support for employees, managers, and other raters to provide a rating and comments for each individual goal.
- Availability of tools to help departments communicate and assign shared key objectives.
- Workflow processes that automatically routes the review for approval to the individual's second (and allows for multiple approval levels) of management, after it is finalized by the employee's immediate supervisor.
- Ability to track review status and allow HR to impersonate the employee for assistance only.
- Allows HR to develop customized review templates that meet the unique requirements of different departments/job titles.

- The solution should be electronic have the capability to print a hard copy as needed.
- Enables staff and their managers to quickly access a complete history of performance.
- Have the ability to send out automatic alerts to evaluators on upcoming evaluation timelines via email (preference would also include a texting option) and integrates with MS Outlook.
- System generated reminder notifications to ensure reviews are submitted on time.
- Information inputted is automatically saved.
- All data submitted through the system is secure and confidential.
- Solution should be able to set varying levels of user rights for different individuals, groups, directors, users, etc. These rights should control which administrators are permitted to view, complete, and delegate evaluations.
- The solution shall provide confidentiality – for example, employees/supervisors can view only their data.
- System will provide standard delivered reports (evaluation schedules and timelines, progress reports, assigned evaluations by administrators, etc.) as well as allow HR to develop custom reports as needed.
- Dashboard that displays performance reviews as pending, completed, annual, and probationary.
- Standard report export formats are supported (CSV, XLS and/or PDF).
- Allow for authenticated e-signatures.
- Ability for HR to transfer a review in progress to another manager.
- Ability for HR, manager and individual to add notes before the evaluation is closed.
- Ability for HR and manager to attach/upload documents such as personal improvement plans (PIP) to the performance evaluation for accountability purposes.
- Ability to have multiple-level managers and dotted line reporting relationships as needed.
- Support for various types of reviews such as annual and end of probationary periods.
- Ability to have automatic notifications launch upcoming performance reviews based on dates.
- Allow supervisors to rate the success toward meeting each individual rating criteria and goal within the solution.
- Use of percentages of the position description to weigh the rating scores for each rating criteria to determine the overall score.

Preferred Functions

- Check-In tool to enable staff and managers to collaborate and record feedback in a shared online space. Entries will alert the other party to provide information in real time. Entries can also be marked private if either party wishes to make the entry for personal reference purposes only.
- Allow users to establish success criteria for job duties.
- Enable department directors to create department level goals and cascade them down into every employee's goal set to ensure that there is also integration of individual goals with the overall strategic goals of the department/organization.
- Functionality that enables managers to efficiently request performance feedback from staff, peers, customers, direct reports, etc. to aid them in the performance review and feedback process and obtain a 360-feedback report.
- Ability to create, update, maintain and track performance improvement plans (PIP).

- All browser versions/types supported and mobile friendly performance management tool.
- Provide a mobile-friendly portal that allow users to log in easily from their smartphone and receive push notifications when an action is needed.

5.6 LEARNING AND EMPLOYEE ENGAGEMENT MODULE

Intent

The County to implement and maintain a cost-effective and integrated, cloud-based learning management system that supports enterprise-wide administration, documentation, tracking, reporting, authoring and delivery of training system. This proposed solution should be available 24 hours a day, 7 days a week with the ability to support learning and development for 1300+ employees.

Mandatory Functions

- User-friendly and mobile device capability.
- Data entry into the system should be efficient and remove redundancy in processes.
- Ensure security of personally identifiable information is protected. Encryption during all three phases of the data lifecycle. Redaction when providing information not necessary to users. The ability to purge information that should not be retained.
- Modern user interface and dashboard. Access requirements held to IRS Oub1075 standards due to the presence of FTI.
- Resource library of various skills, knowledge, trainings, webinars, podcasts, etc.
- Course content library where classes/certifications can be assigned to employees based on their position (new manager, new director, new hire, etc.).
- Capability to send on employee engagement surveys and gather data from those surveys.
- Robust reporting features – instructional, administrative, and technical.
- Capacity to integrate with Zoom, Microsoft Office Suite, Microsoft Outlook, Microsoft Teams, Abode, Smart Fusion, etc.
- Program shall track required training for positions and individual employees.
- The program shall allow the addition and/or removal of required training to be available to the employee and position levels; as well as add/remove training as needed.
- Ability to automate the reminders and send out push notifications when applicable.
 - Should have the capacity to schedule these reminders and send automatically via email/smartphone text messaging.
 - Ability to send out automatic notifications when required training has expired and/or employee certifications have expired.
- Employee information shall be automatically updated from Smart Fusion.
- Program shall allow administrations (HR) to upload all training documents for a class (PDF) and then attach them to the appropriate class/employee.
- Allow administrators to remove certifications (specifically duplicates).
- Ability to archive and delete classes.
- Ability for administrators to add supervisors to employee's management chain. This information shall be used to allow all supervisors within a management chain (or multiple levels) to seeing training records for employees under their supervision.
- Ability for instructors and admin to store program materials, curriculum and materials for classes.

- Ability to allow employees to enroll in a class, receive a message that the request was received and then allow their direct supervisor/administrator to approve the training request.
- Ability to have scheduled trainings automatically go on their Outlook calendars and receive push notification reminders.
- The system shall have a waiting list capability in the event the class is full and automatically push notifications when spaces open up.
- The system shall have the ability to draft reports to be run by date, course, instructor, department or employee.
- The system shall add the department name to positions to eliminate the confusion caused by multiple departments using the same titles with different job/training requirements.
- The system shall allow for the creation of organizational structures, career progression plans, tiers, or steps for training and/or certifications that are directly imported into the employee training file.
- Employees shall be able to view and print certifications attached to their employee record.
- The system shall display a calendar for employees to be able to see upcoming training and register for an upcoming class.
- The system should allow the administrators to add and edit courses to use as templates for classes.
- The ability to make courses active and inactive shall be given to the administrators to allow for easier selection of classes.
- The system shall allow employees or their supervisors to withdraw from a class with email confirmation sent within the system to HR and/or direct manager for record retention purposes.

Preferred Functions

- Ability to house templates on performance improvement, individual development, check-ins, career development, succession planning, etc.
- Automate class reviews of the training in order to make process improvements as needed depending on review results of the class.
- Ability to have courses (as applicable) accessible across platforms (in-person, video, webinar, seminar, podcast, print, etc.).
- Virtual training attendance logs.

5.7 Implementation Plan

The Offeror must provide a detailed plan for implementing the proposed system. This information **MUST** include:

- Detailed methodology for implementation. Methodology shall include estimated timeframe, overview of phases and milestones, assumptions, and assumed responsibilities.
- Detailed strategy for data conversion. Indicate the automated tools or programs which may be used to convert data as well as the assumed or estimated breakdown of effort between the implementing consultant and the County's staff.
- Project organization chart showing expectations of County and Offeror.
- The availability of a separate online training site provided during and after implementation.

- Names, titles, resumes, and references of implementers likely to be assigned to this project.
- The role and responsibility of the system and/or implementation consultant in the design and implementation of the training plan (e.g., development of customized training materials, delivering training to County end-users).
- The role and responsibility of County staff in the design and implementation.

5.8 Training Plan

The Offeror must provide a detailed plan for training. This information **MUST** include:

- Overview of proposed training plan/strategy, including options for on-site or off-site training services, for the core project team, end-users, and technology personnel.
- The role and responsibility of the software and/or implementation consultant in the design and implementation of the training plan (e.g., development of customized training materials, delivering training to County end-users).
- The role and responsibility of County staff in the design and implementation of the training plan.
- The knowledge transfer strategy proposed by the software and/or implementation consultant to prepare County staff to maintain the system after it is placed into production.
- Descriptions of Classes/Courses/Webinars and other training activities proposed in the training plan. (The Offeror should specify the unit of measure for its training (e.g., units, classes, days, etc.) and define the hours associated with these units of measure.) The Offeror must be very clear about exactly what training is included in the cost of the proposal.

5.9 Maintenance and Support Program

The proposal must specify the nature of any post-implementation and on-going support provided by the Offeror including:

- Post-implementation support.
- Telephone support (e.g., include toll-free support hotline, hours of operation, availability of business hours hotline, etc.).
- Special plans defining "levels" of customer support (e.g., gold, silver, etc.). Define what level of support is being proposed.
- Response time for and definition of various types (levels of severity) of problems reported to the support network (e.g., critical issue response time).
- Delivery method of future upgrades and product enhancements, if any, including historical frequency of upgrades by module.
- Availability of user groups and their geographic areas.

- Problem reporting and resolution procedures.
- Bug fixes and patches.
- All maintenance requirements.
- Current Backup procedures to include time schedule, retention schedule, and stored locations of backups.

6.0 CONTRACT TERM

The contract term shall be negotiated with the successful Offeror and shall commence upon approval by the York County Council of the final contract with the selected consultant.

7.0 SUBMITTAL REQUIREMENTS

7.1 Online submittal: Electronic submittals shall be uploaded in PDF format via the Getall online portal which can be accessed via <https://www.yorkcountygov.com/217/Procurement> under the Active Bids link. To ensure that an electronic submittal is received by the due date and time, it is recommended that submittals are uploaded allowing sufficient time prior to deadline. An email confirmation of submittal will be received after clicking on the Confirm Bid button in the GetAll system. If confirmation email is not received, contact GetAll support at support@getall.com to confirm submittal was successful. Faxed information is not acceptable. Proposals received after specified time and date will be considered as non responsive and will be rejected accordingly.

7.2 The Offeror shall be responsible for confirming that submittal is received by the deadline. Any submittal received after the closing date and time deadline will not be considered.

7.3 For step by step instructions on how to submit a response select Help and then Quick Reference in the [Getall](#) portal:

7.4 The following information must be tabbed to identify the required information. Failure to submit this information will render your Proposal as non-responsive.

TAB 1: SOFTWARE FUNCTIONALITY: Evaluation will be based upon how well the proposed application software meets York County's requirements, including but not limited to the proposed capabilities of each module and ease of use.

TAB 2: TECHNICAL APPLICATIONS: Evaluation will be based on the operating system, database management systems, and associated tools for online queries and adhoc report generation, redundancy and backup/restore procedures.

TAB 3: PROGRAM IMPLEMENTATION & TRAINING: Provide a description of the Offeror's approach to providing the services requested in the Scope of Work to include deliverables, milestones, and a project schedule.

TAB 4: SOFTWARE MAINTENANCE & SUPPORT: Provide a description of the Offeror's approach to providing the services.

TAB 5: QUALIFICATIONS OF THE FIRM: Provide a description and history of the firm along with information related to previous experience of providing services similar in nature, size and scope to this Request including the number of government installed Performance Management accounts.

Provide at least three (3) references including the name of company and contact information, which the firm has performed services within the past five years that are similar to the requirements of this Request.

TAB 6: QUALIFICATIONS OF STAFF: Provide an organization chart, resumes, and summary of staff qualifications; along with key project staff pertaining to the contract. Key staff's experience demonstrating current capacity and current expertise relating to this Request. Provide education, certifications, or special training of key staff members who would be assigned to the contract.

8.0 ADDITIONAL SUBMITTAL REQUIREMENTS

8.1 Letter of Interest: The letter of interest shall identify a contact person for questions during the RFP process. Provide contact information, including telephone number, fax, email, and postal address.

8.2 A copy of this RFP's signature sheet properly signed to include the manual signature of an authorized representative of the firm and all appropriate address and contact information as listed on this form.

8.3 All proposing firms shall list contracts currently being performed or performed in the last five (5) years by their firm, including for York County, if applicable, showing the date of contract and the amount of fee received. If contracted with York County, indicate whether the firm was under contract as a sub-consultant to another firm.

9.0 PREPARATION OF PROPOSAL

1. All proposals should be complete and carefully worded and must convey **all** information requested by York County. If errors are found in the proposal, or if the proposal fails to conform to the requirements of the RFP, the evaluating committee will be the sole judge as to whether that variance is significant enough to reject the proposal.
2. Proposals should be prepared simply and economically. All data, materials and documentation shall be available in a clear, concise form. If additional information is required, Offeror shall supply additional materials as needed for the evaluating committee's internal use. York County reserves the right to reproduce proposals for internal use in the evaluation process.
3. All proposals shall provide a straight-forward, concise description of Offeror's ability to satisfy the requirements of the RFP.
4. If a proposal includes any documents or comment(s) over and above the specific information requested in this RFP, such material must be uploaded as an appendix under other files in the GetAll portal.

5. Proposals must be made in the official name of the individual, firm, or corporation under which the business is conducted (showing official business address) and must be signed by a person duly authorized to legally bind the business entity submitting the proposal.

9.1 SUBMITTING REDACTED OFFERS – Proposals received by York County are considered public documents under the provisions of the South Carolina Code of Laws, Section 30-4-40, Freedom of Information Act (FOIA). If your offer includes information marked as Confidential, “Trade Secret,” or “Protected”, you must also submit a digital copy in PDF format, of your offer from which you have removed or concealed such information (redacted copy). The redacted copies should (1) reflect the same pagination as the original, (2) show the empty space from which information was redacted. Except for the information removed or concealed, the redacted copies must be identical to your original offer. Marking your entire proposal as Confidential/Proprietary is not in conformance with the South Carolina Freedom of Information Act absent explanation providing an exemption under Section 30-4-40. A redacted copy if applicable, must be uploaded under submit response in the GetAll portal.

10.0 EVALUATION / AWARD CRITERIA

10.1 A selection committee will evaluate all proposals and organize a short list of firms for further consideration. York County reserves the right to invite short-listed firms to make a presentation to the selection committee as deemed necessary. The criteria will be scored based upon the information provided below:

<u>Specifications:</u>	<u>Maximum Points:</u>
Functional Specifications	200
Total Cost	150
Technical Specifications	100
Maintenance and Support Program	100
Implementation Plan	100
Training Plan	75
Corporate Experience	25
Key Personnel Experience	<u>50</u>
TOTAL	800

10.2 PROTEST PROCEDURES - Any prospective bidder, offeror, contractor or subcontractor aggrieved in connection with the solicitation of a contract shall protest to the Procurement Director within seven days, but not thereafter, of the date of issuance of the invitation for bids, request for proposals or other solicitation documents, whichever is applicable, or any amendment thereto, if the amendment is at issue. Any actual bidder, offeror, contractor or subcontractor aggrieved in connection with the intended award or award of a contract shall protest to the appropriate Procurement Officer within seven days, but not thereafter, of the date notification of award is posted. A protest shall be in writing, submitted to the Procurement Director, and shall set forth the grounds of the protest and the relief requested with enough particularity to give notice of the issues to be decided, and must be received within the time provided.

11.0 INQUIRIES: General questions about this solicitation should be submitted through the [Getall](#) portal, by selecting the questions icon in the corresponding Q&A column.

12.0 SUMMARY

A contract may be awarded to the firm whose qualifications and project approach best meets the requirements and criteria set forth in this request and is most advantageous to the County. The proposing firm shall demonstrate compliance with the requirements established in this RFP and must be able to perform the tasks in accordance with the standards contained herein. The successful firm shall have the full and sole responsibility of providing all of the proposed services as finally agreed upon and accepted by the County.

13.0 GENERAL REQUIREMENTS

13.1 All Offerors including the employees of the Offeror must comply with all applicable Federal, State, and County laws pertaining to contracts entered into by governmental agencies, including non-discrimination employment. Contracts entered into on the basis of submitted proposal responses are revocable if contrary to law. Contracts for work resulting from this request will obligate the Offeror to not discriminate on the basis of race, color, creed, religion, handicap, or national origin in their employment practices.

13.2 TITLE VI OF THE CIVIL RIGHTS ACT OF 1964 Contractors shall comply with Title VI of the Civil Rights Act of 1964. York County strongly encourages the use of and involvement of Disadvantaged Business Enterprises (DBE) on this project.

13.3 CONFLICT OF INTEREST: The successful firm shall not knowingly employ, during the period of a contract, or any extensions to it, any professional personnel who are also in the employ of York County and who are providing services involving this request or services similar in nature to the scope of this request to the County. Furthermore, the firm shall not knowingly employ, during the period of a contract or any extensions to it, any York County employee who has participated in the making of a contract until at least two years after his/her termination of employment with York County.

13.4 INDEMNIFICATION AND HOLD HARMLESS: The successful firm shall agree to protect, defend, indemnify, and forever hold harmless, the County, its agents, officers, and employees, from and against any and all claims, liabilities, damages, costs, actions, proceedings, of any nature whatsoever, however alleged or termed, or in any lawsuits, arising in any manner out of any action or failure to act, by the firm, its officers, agents, and employees, or relating to or arising out of the performance or failure to perform, by the firm, its officers, agents, and employees, any obligations arising under its agreement with the County, or any other type claim/lawsuit whatsoever, however alleged or termed, which may arise at any time as a result of or related to the provision of service(s) for the County by the successful firm, without regard to the source, nature, or validity of the claim/lawsuit. Losses, liabilities, expenses and claims for damages shall include, but not be limited to, civil and criminal fines and penalties, loss of use and/or services, claims for injury, damage, disability, property damage, or death, injury to real or personal property, and attorneys' fees, costs, and expenses incurred by the County or any of its agents, officers, and employees.

13.4.1 The County shall not be precluded from receiving the benefits of any insurance the firm may carry which provides for indemnification for any loss or damage to property in the firm's

custody and control, where such loss or destruction is to County property. The firm shall do nothing to prejudice the County's right to recover against third parties for any loss, destruction or damage to County property.

13.5 DRUG-FREE WORKPLACE: During the performance of this request, the firm agrees to provide a drug-free workplace for his employees; post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the workplace and specify the actions that will be taken against employees for violations of such prohibition; and state in all solicitations or advertisements for employees placed by or on behalf of the firm that the firm maintains a drug-free workplace. For the purposes of this section, "*drug-free workplace*" means a site for the performance of work done in connection with a specific contract awarded to a contractor/firm in accordance with this chapter, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of this request.

13.6 APPLICABILITY/JURISDICTION OF SOUTH CAROLINA LAW AND COURTS: Upon award of a contract under this request the person, partnership, association or corporation to whom the award is made must comply with the laws of South Carolina which require such person or entity to be authorized and/or licensed to do business with this State. Notwithstanding the fact that applicable statutes may exempt or exclude the successful firm from requirements that it be authorized and/or licensed to do business in this State, by submission of this signed proposal, the firm agrees to subject itself to the jurisdiction and process of the courts of the State of South Carolina as to all matters and disputes arising or to arise under the contract and the performance thereof, including any questions as to the liability for taxes, licenses, or fees levied by the State.

13.7 CERTIFICATE OF INSURANCE: Once selected, the successful firm will be required to provide proof of insurance to include professional liability; workers compensation, employer's liability and general liability prior to commencing work.

13.7.1 The firm must procure and maintain, for the duration of this project, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the proposer, his/her agents, representatives, employees or subcontractors. York County requires Certificates of Insurance from proposer's doing business with the county within ten (10) working days from notice of award. York County shall be named as "Additional Insured" on all Certificates of Insurance except Workers Compensation.

- General Liability: \$1,000,000 combined single limit per occurrence for bodily injury, personal injury and property damage,
- Workers Compensation: Coverage's as required by the laws of the State of South Carolina,
- Automobile Liability: \$500,000 combined single limit per occurrence,
- Employers Liability: \$100,000 Bodily by Accident, \$500,000 Bodily Injury by Disease, \$100,000 Bodily Injury by Disease Each Employee.
- Professional Liability: \$2,000,000 per occurrence

13.8 ASSIGNMENT: No contract or its provisions may be assigned, sublet, or transferred without the written consent of the County.

13.9 OWNERSHIP OF MATERIAL: All proposals and supporting materials (including all data, material, and documentation) originated and prepared for York County pursuant to this RFP and including correspondences relating to this RFP shall, belong exclusively to York County.

13.10 PRIME CONSULTANT RESPONSIBILITIES: The Consultant will be required to assume sole responsibility for the complete effort as required by this RFP. York County will consider the Consultant to be the sole point of contact with regard to contractual matters.

13.11 SUBCONSULTING: If any part of the work covered by this RFP is to be subcontracted, the Consultant shall identify the subcontracting organization and the contractual arrangements made therewith. All sub consultants must be approved by York County. The successful Consultant will also furnish the corporate or company name.

13.12 CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY, AND VOLUNTARY EXCLUSION: The Consultant certifies, by submission of this document or acceptance of a contract, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any State, Federal department, or agency. It further agrees by submitting this qualification statement that it will include this clause without modification in all lower tier transactions, solicitations, proposals, contracts, and subcontracts. Where the Consultant or any lower tier participant is unable to certify to this statement, it shall attach an explanation to this solicitation/bid.

13.13 RECORDS RETENTION & RIGHT TO AUDIT: The County shall have the right to audit books and records of the Consultant as they pertain to this contract. Such books and records shall be maintained for a period of three (3) years from the date of final payment under the contract.

The County may conduct, or have conducted, performance audits of the Consultant. The County may conduct, or have conducted, audits of specific requirements of this solicitation as determined necessary by the County.

Pertaining to all audits, Consultant shall make available to the County access to its computer files containing the history of contract performance and all other documents related to the audit. Additionally, any software used by the Consultant shall be made available for auditing purposes at no cost to the County.

13.14 PUBLIC ACCESS TO PROCUREMENT INFORMATION: Subject to the requirements of the Freedom of Information Act, commercial or financial information obtained in response to this RFP which is deemed privileged and confidential by the Offeror, will not be disclosed. Such privileged and confidential information should be clearly marked as such and includes information which if disclosed, might cause harm to the competitive position of the Offeror supplying the information. All Offerors, therefore, must visibly mark as "CONFIDENTIAL" each specific part of their proposal which such Offerors consider to contain proprietary or other privileged information. Additionally, all Offerors shall be solely responsible for identifying as exempt from the Freedom of Information Act and for visibly marking as "EXEMPT FROM FREEDOM OF INFORMATION ACT" each specific part of their proposal which Offerors deem to be so exempt and shall further

be solely responsible for any consequences that might arise from the nondisclosure of any information that is subsequently determined not to have such an exemption. York County hereby disclaims any responsibility for not disclosing information identified by any Offeror as exempt from the Freedom of Information Act and further hereby disclaims any responsibility for any information which is disclosed as a result of Offeror's failure to visibly mark it as "CONFIDENTIAL" or to improperly mark it as "confidential". Offeror must identify specific parts of the proposal package as confidential. Failure to do so or to mark the entire proposal package as confidential may result in disclosure of that information.

NOTE: A redacted copy if applicable, must be uploaded under submit response in the GetAll portal.

13.15 TERMINATION

13.15.1 Should a dispute arise, and if, after a good faith effort at resolution, the dispute is not resolved, either party may terminate the contract by providing thirty (30) days written notice to the other party.

13.15.2 CONVENIENCE: In the event that this contract is terminated or canceled upon request and for the convenience of York County without the required (30) days advance written notice; York County shall negotiate reasonable termination costs, if applicable.

13.15.3 CAUSE: Termination by York County for cause, default or negligence on the part of the Consultant shall be excluded from the foregoing provisions; termination costs, if any shall not apply. The thirty (30) days advance notice requirement is waived and the default provision listed herein shall apply.

13.15.4 DEFAULT: In case of default of Consultant, York County reserves the right to purchase any or all items/services in default in open market, charging, Consultant with any excessive costs.

13.16 NON-APPROPRIATION CLAUSE: Notwithstanding any other provision of this request/agreement, all obligations of the County under this solicitation which require the expenditure of funds are conditioned on the availability of funds appropriated for that purpose.

14.0 NON-COLLUSIVE PROPOSAL CERTIFICATION & DISQUALIFICATION

14.1 By submission of a proposal, each Offeror and each person signing on behalf of any Offeror certifies, and in the case of a joint proposal each party certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief:

The prices in this proposal have been arrived at independently without collusion, consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other proposer or with any competitor.

Unless otherwise required by law, the prices which have been quoted in this proposal have not knowingly been disclosed by the Offeror and will not knowingly be disclosed prior to the proposal opening, directly or indirectly, to any other Offeror or to any competitor.

No attempt has been or will be made by the Offeror to induce any other person, partnership or corporation to submit or not to submit a proposal for the purpose of restricting competition

One Proposal: Only one Proposal from an individual firm, partnership, company, or corporation under the same or under different names will be considered. If OWNER believes that an Offeror submitted more than one Proposal for the work involved, all Proposals submitted by that Offeror will be rejected.

15.0 CERTIFICATION REGARDING IMMIGRATION REFORM & CONTROL

All Contractors are expected to comply with the Immigration and Reform Control Act of 1986 (IRCA), as may be amended from time to time. This Act, with certain limitations, requires the verification of the employment status of all individuals who were hired on or after November 6, 1986, by the Contractor as well as any subcontractor or sub-subcontractor. The usual method of verification is through the Employment Verification (I-9) Form. With the submission of this bid, the Contractor hereby certifies without exception that Contractor has complied with all federal and state laws relating to immigration and reform. Any misrepresentation in this regard or any employment of persons not authorized to work in the United States constitutes a material breach and, at the State's option, may subject the contract to termination and any applicable damages. The Contractor certifies that, should it be awarded a contract by the County, the Contractor will comply with all applicable federal and state laws, standards, orders and regulations affecting a person's participation and eligibility in any program or activity undertaken by the Contractor pursuant to this contract. The Contractor further certifies that it will remain in compliance throughout the term of the contract. At the County's request, the Contractor is expected to produce to the County any documentation or other such evidence to verify the Contractor's compliance with any provision, duty, certification, or the like under the contract. The Contractor agrees to include this Certification in contracts between itself and any subcontractors in connection with the services performed under this contract.

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16.0 COST PROPOSAL: The Offeror must submit one clearly marked detailed cost proposal (separately from the proposal response). A separate Cost Proposal PDF must be uploaded under submit response in the [GetAll portal](#).

Offeror's Official Company Name: _____

Software, Professional Services and Maintenance Costs

Software Module	Proposed Software <i>(identify name of SaaS product)</i>	Cost <i>(list separate cost for each module)</i>	Explanation/ Notes <i>(if applicable)</i>
Talent Acquisition			
On Boarding			
Performance Management			
Learning Employee Engagement			
Bundling Options <i>(please identify savings options available, if applicable)</i>			

Additional Professional Services	Cost	Explanation
Implementation Services		
Data Conversion and Interfaces Estimate		
Training		
Travel and Other Costs		
Total Cost During Project Period	\$	
Ongoing Fees	Cost	Explanation
Monthly or Annual Subscription Fees		
Year Two		
Year Three		
Year Four		
Year Five		

17.0 Acknowledgement of Addenda

Offeror hereby acknowledges receipt of all Addenda through and including:

Addendum No. _____, dated _____

Addendum No. _____, dated _____

Addendum No. _____, dated _____

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SIGNATURE PAGE

OFFERORS MUST COMPLETE AND SIGN THE FORM BELOW

The submittal must be signed by an authorized representative of the Offeror accepting all terms and conditions contained in this document and any addenda. Modifying the terms and conditions of this solicitation may result in your response being rejected.

COMPANY NAME

COMPANY TELEPHONE NUMBER

COMPANY ADDRESS

COMPANY FAX# (IF APPLICABLE)

CITY, STATE, ZIP+4

EMAIL ADDRESS

AUTHORIZED SIGNATURE

FEDERAL ID#

PRINT NAME

DATE

Minority Status

- _____ Not Minority Owned
- _____ African American Male
- _____ Caucasian Female
- _____ African American Female
- _____ Aleut
- _____ Eskimo
- _____ East Indian
- _____ Native American
- _____ Asian
- _____ Other (Please Explain)