

**Lee's Summit R-7 School District
Purchasing and Distribution Services
702 SE 291 Highway
Lee's Summit, MO 64063
816-986-2190
Email: heather.falls@lsr7.net**

**REQUEST FOR PROPOSAL FOR WEB/CLOUD BASED EMPLOYEE
MANAGEMENT EMPLOYEE LIFE CYCLE
RFP NO. 2019-27**

IN ACCORDANCE WITH THE ATTACHED SPECIFICATIONS

PROPOSALS MUST BE RECEIVED BY 3:00 PM (CST) ON MONDAY, MARCH 25TH.

The cutoff date for any written questions for this RFP is March 13th at 12:00 PM (CST).

**It is the responsibility of interested firms to check www.publicpurchase.com
for any addendums or notices of information prior to the opening date and time of this RFP.
All addendums must be signed and included with your submitted proposal.**

The undersigned certifies that he/she has the authority to bind this company in an agreement to supply the commodity and/or services in accordance with all terms, conditions, and pricing specified herein or to offer a "no response." Please type or print the information below. **The Respondent is REQUIRED to complete, sign and return this form with your submitted response for this RFP.**

<hr/>		<hr/>	
Company Name		Authorized Person (Print)	
<hr/>		<hr/>	
Address		Signature	
<hr/>		<hr/>	
City/State/Zip		Title	
<hr/>		<hr/>	
Telephone #	Fax #	Date	Tax ID #
<hr/>		<hr/>	
E-mail		Entity Type (Corporation, LLC, Sole Proprietor, Partnership)	

If submitting a "no proposal" please provide a brief explanation for the reason why and return this page:

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REQUEST FOR PROPOSAL #2019-27 FOR
WEB/CLOUD BASED EMPLOYEE MANAGEMENT EMPLOYEE LIFE CYCLE

LEGAL NOTICE

The Lee’s Summit R-7 School District is accepting proposals for Web/Cloud based Employee Management Employee Life Cycle. Specifications, terms, and conditions are specified in the RFP packet. The RFP and required specifications can be found on the District’s website in the Purchasing & Distribution Services Department as well as the Public Purchase website. All questions, requests for information or clarification pertaining to this RFP must be submitted in writing to the District’s Public Purchase website, www.publicpurchase.com before 12:00 PM on March 13th. Proposals must be uploaded to Publicpurchase.com no later than **3:00 PM on Monday, March 25th**.

SCOPE: The Lee’s Summit R-VII School District is soliciting proposals for Web/Cloud based Employee Management Employee Life Cycle. This contract will include but is not limited to: a complete vendor-hosted or locally hosted, web/cloud-based solution to manage employee information for the life cycle of the employee.

1.0 INSTRUCTIONS TO RESPONDENTS:

- 1.1 All questions regarding this RFP shall be submitted in writing to the District’s Public Purchase website. The District reserves the right to reject any and all proposals, to waive technical defects in proposals, and to select the proposal(s) deemed most advantageous to the District.
- 1.2 Proposals submitted on separate forms are NOT acceptable unless specified in the document. Failure to complete forms to the satisfaction of the District may result in the rejection of your proposal.
- 1.3 It is the responsibility of each respondent before submitting a proposal to examine the documents thoroughly and request written interpretation or clarifications soon after discovering any conflicts, ambiguities, errors, or omissions in the proposal documents. Requests for clarification must be received in writing through the Public Purchase website no later than **March 13th** at 12:00 PM (CST).
- 1.4 Changes to the specifications will not be allowed except by written addendum issued by the District through the Public Purchase website. Oral explanations or instructions given prior to award will not be binding.
- 1.5 Respondent shall quote net costs of all goods and services requested and all quotes shall include all transportation to destination and inside delivery.
- 1.6 Acceptance of this proposal or any part thereof, in writing, within ninety (90) days after the closing date, by the District shall constitute a legal and binding agreement; wherein, the vendor shall furnish the services in accordance with the specifications and offeror’s proposal on the written order of the District.
- 1.7 The District reserves the right to award this contract in its entirety or to split the contract among bidders, whichever is in the best interest of the District. The District may accept any item or group of items of the bid unless qualified by specific limitation of the bidder.
- 1.8 Respondents shall initial all pages where the proposal document denotes “RESPONDENT’S INITIALS: ____”.
- 1.9 To be considered, a firm must have at least three (3) proven clients of similar size to our district.

1.10 **SELECTION PROCESS**

The proposals will be evaluated by a District Selection Committee (DSC) comprised of selected District personnel. The overall process may consist of two steps: the first being a review and evaluation of all responsive proposals and the second being the interview phase for the short list of respondents selected for interview, if applicable.

The Proposal Ranking Sheet for the evaluation of the proposals is included in this RFP. The DSC may request additional submittals.

2.0 SPECIFIC REQUIREMENTS OF RFP:

RFP 2019-27 Web/Cloud Based Employee Mgmt Employee Life Cycle

- 2.1 Purchase Agreements shall be awarded in accordance with regulations adopted by the Lee's Summit R-VII Board of Education and adhere to all applicable purchasing policies. Purchase Agreements will be negotiated with the lowest responsible bidder who meets the qualifications for quality, price, terms of bid, and service, and determined to be in the best interest of the District. The RFP award will be at the sole discretion of the District. The District reserves the right to reject any and all bids in part or in whole, and to accept the proposal that is in the best interest of the District.
- 2.2 The contract term shall be one (1) year from the date of agreement. At the District's option, the contract may be extended for three (3) additional one (1) year periods. The Fee Schedule may be adjusted at the end of the initial contract period (and at the end of each extension period, if applicable), upon mutual agreement of both parties.
- 2.3 Prices shall be fixed with minimum adjustments allowed. If the respondent is awarded an agreement under this RFP solicitation, the prices proposed by the respondent shall remain fixed for a period of one hundred eighty (180) days after the issuance of an initial purchase order or District Visa P-Card purchase, regardless of market conditions. After this period, the vendor may submit a price adjustments to the District based on a Manufacturer's Revised Published Price List. The request MUST contain a written notification from the manufacturer to the supplier or vendor of price increases. The Revised Published Price List or manufacturer's notification shall be submitted to the District at least thirty (30) calendar days prior to the effective date of the new price to be charged to the District. It shall be understood that such price adjustments shall not exceed the amount passed onto the supplier or vendor by the manufacturer. It shall be further understood that the District reserves the right to reject any price adjustments submitted by the respondent and/or to terminate the contract with the respondent based on such price adjustments.
- 2.4 The successful respondent(s) must agree to accept the District's Purchase Order or the District's Visa P-card for the order. These purchases are tax exempt.
- 2.5 **RFPs must be uploaded to Publicpurchase.com no later than 3:00 PM on March 25th. Please note, registration with Public Purchase can take up to 36 hours, so do not wait until the day of the RFP closing to register and upload your proposal.**
- 2.6 The Lee's Summit R-VII School District will review all proposal submissions with regards to pricing, product performance, and equipment features. The District plans to award the RFP within 30 days after the RFP opening.

3.0 SPECIFICATIONS:

3.0 Purpose

- The proposal is a single, complete proposal.
- Proposal is from a qualified vendor for a complete vendor-hosted or locally hosted, web/cloud-based solution to manage employee information for the life cycle of the employee. LSR7 will retain ownership over all the data.

3.1 Background/Demographic Information

- The solution must be able to meet all the functional, technical system and quality requirements outlined.
- The solution offers a screener for administrators, certified and classified employees, including coaches and staff with extra-curricular duties, and volunteers.
- The solution will provide a complete vendor-hosted system for HR Recruitment, Personnel Management, Employee Evaluations, Onboarding, Payroll, Benefits Management, Certified staff Professional Development and Electronic Filing.

3.2 Scope of Work

- The web/cloud-based solution integrates with the District's current employee management system, PowerSchool Business Plus 7.9 with an anticipated upgrade to 7.11 in the future.
- The proposed application shall include, at minimum, but not limited to, the following processes/features and all current employees shall be loaded into the new system for annual evaluations, annual policy review/employee training, and employee record retention.

3.3 Application

- The solution provides a landing page for the District to promote a positive image of the District and be inviting to applicants encouraging them to apply.
- The solution provides a flexible user managed application; applicant can register, create, edit, modify and update application with new information or apply for additional positions as they are posted.
- The solution will automatically direct the applicant to the applicant Screener once the application is complete.
- The solution allows the District to post job positions with attached job description and manage posting and closing dates for openings.
- The solution allows for video interviewing/screening.
- The solution provides a feature for ADA and multi-language options.
- The solution allows for customizable applicant forms, job description templates, interviewer forms, and carryover of data so applicant only needs to enter data once.
- The solution allows for notifications to applicant on application status and a scheduling facility for job interviews.
- The solution allows for automatic posting of jobs on Twitter and other identified media sources.
- The solution must be available on a mobile app platform.

3.4 Applicant Screener

- The solution allows the applicant to complete the screener related to the job position (teacher, administrator, classified, food service, transportation, etc.) he/she is applying.
- The solution provides results that are populated into the application and can only be seen on the Employer side.
- This screener may be in partnership with another proposer if not included as a part of overall solution.

3.5 Employee Onboarding

- The solution proves that once an applicant is selected to become an employee, the District can upload documents, audio, and video for the new employee to watch from the website.
- The solution documents (date stamp) when the employee read/viewed and records on the employee's record.
- The solution allows the new hire to complete online employment forms, such as W4, I9, Employment Information packet/form and other new hire paperwork through various workflows.

- The solution allows the new employee to complete direct deposit forms or integrate s links to current PowerSchool Employee Online module.
- The solution allows the employer to view status (if viewed, started, or completed by applicant) of form and completed form(s) for processing purposes.
- The solution allows secure roles and permissions for specified staff in accessing records.
- The solution allows for the ability to create and deliver employment contracts, compensation summaries, and letters for differing classes of employees or integrates links with current PowerSchool process.
- The solution allows for the ability to export data in formats that are compatible with current and/or future systems.

3.6 Annual Employee Policy Review and Training

- The solution designates on an annual basis that each employee will log in, review and acknowledge understanding and compliance with critical board policies and procedures.
- The solution allows for the date acknowledged by employee to be added to his/her record.
- The solution allows for online and onsite training for all employees and volunteers.
- The solution allows for electronic or web-based training modules.

3.7 Employee Annual Evaluation

- The solution provides on an annual basis, a format so each administrator/supervisor will log in and complete a performance evaluation on each employee he/she supervises. Workflow will notify the supervisor/administrator.
- The solution allows for the employee to log in, to view, comment if necessary, and digitally sign and submit the evaluation. The administration will then digitally sign, finalize, and submit.

3.8 Employee Records

- The solution will maintain the records pertaining to each employee in digital form. The records to include, but not limited to, application, evaluations, FMA documents, workers' compensation documents, leave requests, annual policy review indicator, W4 payroll documents, etc.
- The solution allows for secure, integrated repository for storing and managing all employee documents.
- The solution will provide for multiple layers of security with attachments to limit access.
- The solution provides the ability to upload and categorize directly from applicant recruitment process.
- The solution provides the ability to use electronic signatures.
- The solution provides user screens that show missing documents and deadlines.
- The solution provides scanning and transfer of current employee paper documents/files into new system.
- The scanned documents allow for searchable information.

3.9 Professional Development

- The solution provides a system for staff professional development.
- The solution provides the ability to track hours, attach documents, search for classes, set up courses, register online and verify attendance.
- The solution provides automated email reminders, ability to establish different levels of administrative rights based on roles, ability to hide fields that capture certain demographic information, and the ability to import previous history.

3.10 Work Flow

- The web/cloud-based solution will notify users by email of documents or records that need approval, review, or processing through a workflow process.

3.11 Technology

- The solution is a web/cloud-based application.
- The solution works with multiple web browsers including, but not limited to current and future versions of Internet Explorer, Safari, Google Chrome, and Firefox. Should also include a mobile device friendly job application function.
- The web/cloud-based solution has LDAP, Google Authentication, or comparable user authentication functionality.

- Vendor will describe how they will maintain safeguards for personnel information of LSR7 schools and the steps they will take in the event of a data breach if employee data files are compromised.
- Vendor will perform full system testing prior to District rollout.

3.12 Data Migration

- The solution includes a plan for migration of current digital data (from Frontline/AppliTrack, Content360 and TalentEd-Perform) and scanning/uploading of paper records for current employees (approximately 3,500 individuals) as well as former employees with a separation date of 1999 or greater. The paper records include, but are not limited to, applications, W4, I9, leave requests, FMLA paperwork, payroll documents, accounting documents, benefits documents, medical documents, and evaluations.

3.13 Training

- The solution includes a training plan for Human Resources, Business Services and Technology staff (power users), Administrators (complete evaluations, review applications, etc.) and classified and certified staff (evaluations, records, professional development, etc.).
- Vendor will provide detailed implementation and training plan identifying estimated district time to fully implement and vendor time both on and off site to implement.

3.14 Project Implementation

- Vendor will perform full system testing prior to District rollout.
- Vendor will describe how they will maintain safeguards for personnel information and the steps they will take in the event of a data breach if employee data files are compromised.

3.15 Customer Service

- The solution's customer service and technical support is available for the following: applicants in the application section, employees in the evaluation and application sections, administrators in the evaluation and application view sections, and Human Resources, Business Services, and Technology power users in all sections.
- The solution support options are at least (1) a 24/7 online chat, (2) a toll-free number, and (3) an email address for Customer Service.

3.16 Criminal Record Verification

- Successful respondent/vendor will be required to complete criminal record checks on all employees who work on District property for this contract. Employees who have been convicted of a violent or serious felony, including crimes that require registration on the National Sex Offender Registry will not be allowed to work on District property for this contract. Each individual respondent/vendor will be responsible to adhere to any federal, state and local privacy and confidentiality requirements.

4.0 SCHEDULE OF RFP PROCESS AND PROJECT COMPLETION:

4.1 Timeline for RFP Process:

The timeline listed below is the District’s estimation of time required to complete the RFP process. All efforts shall be made to abide by this schedule; however, it is subject to change due to different circumstances.

RFP Notification	March 1, 2019
Receive Proposals	March 25, 2019
Meet to review	April 17, 2019
School Board	May 16, 2019
Notice to Proceed	May 17, 2019

4.2 Timeline of Contract Execution:

The District desires the execution of the contract to meet the following dates: Services need to begin after June 30th, 2019.

PROPOSAL RANKING SHEET

SCORING RANGES

	30 Point Questions		20 Point Questions		
Outstanding	25 – 30		17 – 20		
Exceeds Expectations	19 – 24		13 – 16		
Satisfactory	13 – 18		9 – 12		
Below Satisfaction	0 – 12		0 – 8		

	Evaluation Criteria	Maximum Points	Score
1.	<p>Evidence of Experience & References with Similar Accounts (Ref & Exp)</p> <p>Consider experience and references listed by the firm/provider. Is the firm/provider experienced in providing services similar to that requested in this RFP?</p> <ul style="list-style-type: none"> • Familiarity and experience with similar projects. • Consider the number of years of experience the firm/provider has. • Consider the number of years the firm has been in business. • Consider the references given by the firm/provider. 	30	_____
2.	<p>Applicable Resources (Personnel Qualifications)</p> <p>Evaluate the extent of applicable resources available to the provider to execute the contract:</p> <ul style="list-style-type: none"> • Adequacy of proposed number of staff for the district’s training needs and 24/7 support. • Consider experience of person(s) assigned to service the district’s contract. • Consider proposed online and onsite training offered. 	20	_____
3.	<p>Approach and Understanding of Scope</p> <p>Evaluate the provider’s approach to and understanding of the scope of services required in the RFP as evidenced by the vendor’s proposal:</p> <ul style="list-style-type: none"> • Identify/recognize critical or unique issues specific to the project. • Provide literature outlining plan for implementation and training. • Confirm system integrates with the District’s current employee management system, PowerSchool Business Plus 7.9 with an anticipated upgrade to 7.11 in the future. • Solution meets all the functional, technical system and quality requirements outlined. • Consider security measures taken to protect data. 	30	_____
4.	<p>Cost</p> <p>Determination of cost and pricing data:</p> <ul style="list-style-type: none"> • Consider the amount of time estimated for supplying staff and the fees associated with it. • Consider whether all elements of pricing conform to the requirements of the RFP. 	20	_____
Ranked By: _____		TOTAL POINTS (100)	

COOPERATIVE PROCUREMENT WITH OTHER JURISDICTIONS:

- 1) This section is optional; it will not affect the agreement. If the District awarded you the proposed agreement, would you sell under the prices and terms of this agreement to any public school district or any other non-profit organization having membership in the Mid-America Council of Public Purchasing (MACPP) or Mid-America Regional Council (MARC) and located within the greater Kansas City metropolitan trade area? (All deliveries shall be F.O.B. Destination and there shall be no obligations on the part of any member of said Council to utilize this agreement).

YES _____ NO _____ SIGNATURE: _____

- 2) Sales will be made in accordance with the prices, terms, and conditions of the Request for Proposals and any subsequent term agreement.
- 3) There shall, however, be no obligation under the cooperative procurement agreement for any organization represented by MACPP or MARC to utilize the proposal or agreement unless they are specifically named in the Request or Proposals as a joint respondent.
- 4) All sales to other jurisdictions will be made on purchase orders issued by that jurisdiction. All receiving, inspection, payments and other agreement administration will be the responsibility of the ordering jurisdiction.
- 5) Each jurisdiction that is a party to the joint proposal has authority to act as Administrative Contracting Officer with responsibility to issue purchase orders, inspect and receive goods, make payments and handle disputes involving shipment to the jurisdiction.

FORM NO. 1: CONSULTANT PROFILE

1. Lead Consultant Firm(s) (or Joint Venture) Name and Address:
 - 1a. Firm / Provider is: National Regional Local
 - 1b. Year Firm / Provider Established:
Years of Experience providing Employee Management Services? _____
 - 1c. Licensed to do business in the State of Missouri: Yes No
 - 1d. Name, title, telephone number and email address of Principal to contact:
 - 1e. Address of office to perform work, if different from Item No. 1:

2. Please list the number of persons by discipline that your Firm/Joint Venture will commit to the District's project:

3. If submittal is by Joint Venture or utilizes subcontractors, list participating firms/providers and outline specific areas of responsibility (including administrative and technical) for each firm:
 - 3a. Has this Joint Venture previously worked together? Yes No

FORM NO. 2: KEY OUTSIDE CONSULTANTS

Each respondent must complete this form for all proposed sub-contractors.

SUBCONTRACTOR #1

Name & Address

Specialty/Role with this Project:

Worked with Lead Firm Before: Yes or No

Year Firm Established:

Years of Experience providing Employee Management Services? _____

- Complete Form No. 4 for all key personnel assigned to this project for this subcontractor.

SUBCONTRACTOR #2

Name & Address

Specialty/Role with this Project:

Worked with Lead Firm Before: Yes or No

Year Firm Established:

Years of Experience providing Employee Management Services? _____

- Complete Form No. 4 for all key personnel assigned to this project for this subcontractor.

Bidder's Initials _____

FORM NO. 3: EXPERIENCE/REFERENCES

Work by Firm/Provider (including any subcontractors or Joint-Venture companies) that best illustrate current qualifications relevant to the districts project that has been/is being accomplished by personnel during the past five (5) years that shall be assigned to the District's project. List no more than ten (10) total projects:

Client Name & Address:

Dates of Service:

Client Contact Person, Title & Telephone Number:

Estimated Cost for Entire Contract: \$

Scope of Entire Contract: (Please give quantitative indications wherever possible).

Nature of Firm's/Provider's responsibilities in contract: (Please give quantitative indications wherever possible).

Firms/Providers Personnel (Name/ Project Assignment) who worked on the stated project that shall be assigned to the District's project:

FORM NO. 4: RESUME OF KEY PERSONNEL

Brief resume of key persons, specialists, and certified staff that shall be assigned to the District's Web/Cloud based Employee Management Employee Life Cycle project:

- a. Name and Title:

- b. Assignment:

- c. Name of Firm with which associated:

- d. Years of Experience:
With this firm _____ other firms _____

- e. Education: Degree(s) or Certification(s)/Year/Specialization:

- f. Current Registration(s):

- g. Other Experience & Qualifications relevant to the proposed project:

FORM NO. 5: PROJECT NARRATIVE

Use this space to provide a detailed project approach including but not limited to:

- Schedule and detailed approach is reasonable/responsive to District's needs
- Describe Services offered
- Identify any and all proven techniques used
- Roles of all involved parties clearly identified
- Familiarity with project location as evidenced by proposal/interview (if applicable)
- Identify/recognize critical or unique issues specific to the project and unique approaches used elsewhere
- Proposed timeline for implementation of contract
- Proposed communication process

The foregoing is a statement of facts.

Signature:

Typed Name and Title:

Telephone Number:

Date:

**FORM NO. 6: PRICING: Web/Cloud based Employee Management Employee Life Cycle
Based on all items included in Specifications**

DESCRIPTION OF SERVICE	
Cloud Based Employee Management Employee Life Cycle System	\$
Online and Onsite Training	\$
	\$
GRAND TOTAL	\$

Respondent must complete the following section in its entirety and sign and date where indicated. This agreement shall take effect upon the approval of the District.

The undersigned respondent hereby proposes to furnish all transportation, equipment, supplies, materials and perform all necessary labor to complete all work stipulated in, required by, and in conformity with the proposed agreement documents and specifications attached hereto and other documents referred to therein for and in consideration of prices as follows:

- A. **Acceptance of proposal by District:** The District shall have maximum ninety (90) calendar days from the date of the proposal opening to accept respondent’s offer.

- B. **Response time/delivery:** As specified in requirements

- C. **District standard payment terms are Net 30 after receipt of invoice. Payment terms are negotiable. Please state any discounts offered:** _____

- D. **Submittals:** The following must be submitted with proposal
 - 1. **Forms 1 - 6**
 - 2. **Completed W9 and E-Verification Affidavit**
 - 3. **Certificate of Insurance**
 - 4. **References and Experience**
 - 5. **Personnel Qualifications**
 - 6. **Return all parts of this complete document (respondents to keep copy of proposal submitted)**

Signature:

Typed Name and Title:

Telephone Number:

Date:

Bidder’s Initials _____