Request for Proposal (RFP) for Performance Management System

Release Date: December 1, 2014

Submittal Deadline: December 19, 2014
No later than 5:00 p.m. EST
I. Purpose
a. Statement of Purpose

This Request for Proposal (RFP) is for the selection of a consultant to develop and implement a turn-key Performance Management System for the City of Greenville, NC. The Performance Management System will promote and support professional development, link with merit based compensation system, and promote the overall success of the organization. The anticipated contract start date is February 2, 2015.

b. City of Greenville Local Preference Policy

It is the policy of the City of Greenville to ensure the best overall value in the procurement of goods and services and to support the City’s economic development. Therefore, the City of Greenville has adopted a Local Preference Policy which provides a preference to eligible local bidders in the awarding of certain City contracts.

The City’s Local Preference Policy may be viewed at www.greenvillenc.gov\Businesses\PurchasingDivision.

Questions regarding the City’s Local Preference Policy should be directed to the Purchasing Division of the City of Greenville at (252) 329-4664.

c. General Information

All proposals and related materials become the property of the City of Greenville and may be returned only at its option.

The City of Greenville is not obligated to accept any proposal or to negotiate with any respondent. All transactions are subject to the final approval of the City of Greenville who reserves right to reject any and all proposals without cause and to make the award that is in the best interest of the City.

All costs directly or indirectly related to responding to this RFP (including all costs incurred in supplementary documentation, information or presentation) will be borne by the proposer.
II. Instructions to Proposers
   a. All proposals must be submitted to:

      Leah Futrell, Director of Human Resources
      City of Greenville
      Human Resources
      P.O. Box 7207
      Greenville, NC 27835-7207

      The proposals must be delivered no later than 5:00 p.m. EST on December 19, 2014. Proposals will not be accepted after this date and time.

   b. Any questions relating to the Request for Proposals shall be faxed or e-mailed to the contact person whose name appears below no later than December 10, 2014 at 5:00 p.m. EST. All such questions will be answered in writing and such answers will be provided to all parties having obtained a Request for Proposal packet by the City of Greenville.

      Contact person: Leah Futrell, Director of Human Resources
                     City of Greenville
                     P. O. Box 7207
                     Greenville, North Carolina 27835
                     lfutrell@greenvillenc.gov
                     252/329-4747 (fax)

   c. Three (3) copies of the proposal must be submitted. No proposals or modifications to proposals may be made by telephone or fax.

   d. Proposals must be submitted in a sealed envelope properly addressed as indicated in section II (a) above, and clearly marked with (1) Request for Proposal for Performance Management System and (2) Vendor’s name and address on the envelope. All proposals must be typewritten.

III. Minimum Qualifications
    All proposers must:

    a. Have at least five (5) years of experience in providing services as outlined in this RFP to groups of similar size as the City of Greenville. Experience in providing services as outlined in this RFP to public sector organizations and their employees is desirable.

    b. Have sufficient, competent and skilled staff, with experience in performing the services.

    c. Have all appropriate licenses and certifications required by the State of North Carolina to perform the services.

    d. Be able to perform the services in a confidential and professional manner.
IV. Description of Organization

a. The City of Greenville (City) is located 85 miles east of Raleigh, North Carolina and provides various municipal to the citizens of the City of Greenville. The City of Greenville employs 752 full-time employees and approximately 300 part-time employees. Additional information about the City of Greenville can be obtained by visiting www.greenvillenc.gov.

V. Scope of Work

a. Background
The successful proposer will provide all materials, support, design, equipment, tools and training necessary to provide and implement a Performance Management System to the City of Greenville. Proposer will develop a standardized performance appraisal process that will be used by all departments and divisions of the City of Greenville.

b. Requirements of Proposal
• Vendor will follow the steps below during their contract period:
  o Review current policies and procedures used within the City of Greenville.
  o Interview managers and staff to identify the needs of the Performance Management System.
  o Develop a Performance Management System that meets the needs of the diverse workforce of the City of Greenville.
  o Aid in the implementation of the approved plan through training, delivery of materials, and participation in meetings.

• The Proposal will contain the following information:
  o A description of the proposed Performance Management System.
  o A description of training that will be given to managers and employees.
  o The timeline for the development and implementation of the program.
  o The methodology of the program.
  o All costs associated with the program.
  o Answers to all questions listed in Section V. (b) of this RFP.
  o Descriptions of the tools and materials that you will supply for the program’s use and training.
  o A brief overview of how the plan will function within the daily/yearly operations of the City of Greenville.

• The Performance Management System must meet all of the following criteria:
  o Be competency based with the ability to designate competencies as City-wide, department specific, position specific, etc.
o Ability for each performance appraisal to be tailored to the job and department in which it is used.
o Ability to be linked to an employee’s job description.
o Ability to be used in a merit based compensation system.
o Ability to create development and/or improvement plans as part of a positive discipline program and track progress towards such plans throughout the year.
o Ability to be used in succession planning.
o Ability for performance appraisals to be updated periodically throughout the year.
o Ability to complete multiple performance appraisals during one year.
o Ability to utilize feedback from multiple sources, such as managers, peers, direct reports as a basis for competency ratings.
o The system will need to be able to be electronically managed within the City’s future ERP program that will be placed into service on July 1, 2016. The ERP, Munis version 10.5 by Tyler Technologies, is a comprehensive ERP with self-service capabilities. Below are listed the functions of Munis that must be able to work in concert with the proposed Performance Management System:
  ▪ Employee self-service functionality where employees can review and/or comment on their performance appraisals at any time.
  ▪ Maintains a history of past performance appraisals and tracks/trends employee performance over time.
  ▪ Utilizes a measurement system of rating employees based on their rating (e.g.: Good/Fair/Poor) in certain competencies which will produce a score for each competency used according to that competency’s weight.
  ▪ Ability for both management and employee to leave comments.
  ▪ Ability for performance appraisals to be automatically routed through approval chains.
  ▪ Ability for management to suggest pay raises.
  ▪ Ability to post development plans associated with performance appraisals.
o Ability to aid in the integration of the Performance Management System with Munis in 2016.

a. Preferred Features of Proposal
  ▪ Ability to provide the City with audio, video or online accessible training tools to use in future training of City of Greenville employees on the vendor’s Performance Improvement Program.
b. Proposer Questionnaire
Proposer will include answers to the following questions in their respective proposal:

1) How long has your company been in business?
2) Describe/provide a proposed implementation plan.
3) What training and/or staffing will be required?
4) Please describe the training courses, tools or methods you propose for implementation.
5) Will there be an implementation specialist provided for support?
6) What kind of support services will be provided after implementation?
7) Are you able to develop a program that will work in concert with Munis version 10.5?
8) Are you able to develop and provide a comprehensive list of competencies for the City?
9) How will your proposed program be able to be updated throughout the year?
10) How will your program be able to incorporate individual job descriptions into the performance appraisal process?
11) How will your program be able to be aligned with a merit based compensation system?
12) How will your program be able to vary competencies systematically by position or department?
13) How will your program be able to use multi-rater features?
14) How will your program be able to facilitate multiple review cycles?
15) How will your program be able to develop and track goals, development plans, succession plans, performance improvement plans and the like?
16) How will your program be able to aid managers in giving standardized assessments across employees, managers, and departments?
17) Will you provide evaluation forms or templates and the ability to incorporate changes to those forms?
18) Will your program have the ability to weight competencies based on importance?
19) What is the duration of your program’s development and implementation, with a timeline of steps?

VI. Requirements of Vendor

The City of Greenville will expect the vendor to perform the services noted below. Each proposal must respond to each item listed below:

a. To provide advice and expertise regarding the program requested in this RFP.

b. To attend meetings with Human Resources staff and make presentations on items of interest to the City of Greenville Council and City of Greenville Committees as requested and/or determined to be necessary.
VII. Content of Proposals

At a minimum, each proposal shall include:

- Cover letter – a brief introductory letter of representation.
- Firm name, address, telephone, and date established.
- Names and addresses of owners or significant stockholders (greater than 10%).
- Names of office principals and their experience in providing plans of the type described in this RFP.
- Descriptive literature – illustrative or descriptive literature, brochures, etc. that provide additional information with regard to issues addressed in other areas of the request for proposal. Include specimen copies of contract and a copy of the billing invoice.
- Proposed costs associated with proposal, including a la carte costs depending on services.
- The name of the account executive who will service the City’s contract, including that individual’s experience and qualifications.
- A copy of all licensing required.
- Vendor Background Information – include a description of the vendor’s experience with services similar to the one described herein. This information should include scope of several similar jobs including magnitude and cost, customer contacts and other information that the City of Greenville can use as a basis for proposal evaluation.
- References of three (3) commercial clients that can be contacted regarding the quality and competency of your firm and the account executive.

VIII. Selection

Proposals will be evaluated by the members of the City staff based on the vendor’s self-reported ability to meet the requirements as outlined in this RFP. The proposer may be asked to submit to an interview or give an oral presentation of their respective proposal to the evaluation committee. This interview or oral presentation is to be a fact finding and explanation session only and is not to be used to negotiate any terms of contract. Evaluation and award may be made based on the proposal of the vendor without subsequent interviews or responses to additional questions. Vendors should not submit a proposal in anticipation of an additional interview or evaluation questions. All travel expenses to and from the interview or oral presentation shall be the responsibility of the proposer. Selection criteria will include:

- Cost associated with the proposal.
- Experience and qualifications of the firm and account executive(s) assigned to the City’s account.
Experience with public sector organizations.
- The proposer’s status as a local preference vendor.
- Overall clarity and responsiveness of the proposal to this RFP.
- Timeline for project completion.
- Award may not be limited to the lowest price but to that Vendor that provides the best value and compliance with the criteria. However, the City may elect to make the award based on pricing.

IX. Schedule of Selection

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>RFP Released to Prospective Respondents</td>
<td>December 1, 2014</td>
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<tr>
<td>Questions from Respondents Answered</td>
<td>December 10, 2014</td>
</tr>
<tr>
<td>Due Date and Time for Proposal</td>
<td>December 19, 2014</td>
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<tr>
<td>Targeted Start Date of Contract</td>
<td>February 2, 2015.</td>
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X. Assurances

By responding to this RFP, each proposer assures the City that, if selected as a vendor, he or she will comply with all provisions of this RFP and the vendor’s proposal throughout the term of the contract.
VENDOR/CONSULTANT REGISTRATION FORM

Name of Organization: ____________________________________________

Federal Tax ID #: ______________________________________________

Business Address: ______________________________________________

City, State, Zip: ____________________________ Phone # _____________

Main Contact Person: ____________________________________________

Fax # ____________________________

Email address for Main Contact: __________________________________

Organization Structure (Please check one)

☐ Individual ☐ Partnership ☐ Corporation

☐ Government Agency ☐ Non-Profit Agency ☐ Public Utility

Small Business ☐ Yes ☐ No

Minority-Owned Business ☐ Yes ☐ No

Please describe the major product(s) or service(s) provided by your company:

_________________________________________________________________

_________________________________________________________________

_________________________________________________________________
DISCLOSURE STATEMENT

The organization must disclose any possible conflict of interest with the City of Greenville, including, but not limited to, any relationship with any City of Greenville employee or official. The response must disclose if a known relationship exists between any owner or officer of the organization and any City of Greenville employee or official and any known relationship with any owner or officer of the organization with the City of Greenville. If no relationship exists, this should also be stated in the response. Failure to disclose such a relationship may result in the ineligibility of the proposal for consideration or cancellation of the contract as a result of the response. This form must be completed and returned in order for the proposal to be eligible for consideration.

Relationship Exists □ Yes □ No

If you checked “Yes”, please explain the relationship:

________________________________________________________________________

________________________________________________________________________

I CERTIFY THAT:

a. I, as an officer of the organization, or per the attached letter of authorization, am duly authorized to certify the information provided herein is accurate and true as of the date of this proposal.

b. The organization shall comply with all State and Federal Equal Opportunity and Non-Discrimination requirements and conditions of employment.

Printed Name ___________________________________________ Title ________________________________

Signature ___________________________________________ Date ________________________________