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RFP #JG090211

PERFORMANCE APPRAISAL SYSTEM

I. Objective

The purpose of this Request for Proposal is to enter into a contract with a qualified responsible and responsive performance management system vendor for the provision of **RFP #JG020911 PERFORMANCE APPRAISAL SYSTEM** to the Central Virginia Community Services Board (CVCSB/CSB) in accordance with the terms and conditions of the Request for Proposal.

II. Timeline

A. Proposal Issuance Date

Friday, February 11, 2011

B. Question Deadline & Contact Information

Questions concerning this RFP should be directed, in writing by mail (jay.goding@cvcsb.org) or fax (434-455-3431) to **Jay Goding (voice 434-847-8050 x1269)** in the Purchasing Office no later than 7 days prior to the closing date of the proposals. Any revisions to the solicitation will be made only by written addendum issued by the Purchasing Office.

C. Proposal Deadline

Thursday, February 24, 2011, no later than 3 PM. Any proposal received after that time will not be considered.

D. Period of Contract

The period of this contract will be based upon the date of the award.

III. Background

Central Virginia Community Services Board (CVCSB) has facilities in the surrounding area to provide services for Mental Health, Intellectual Disability, Substance Abuse and Prevention. CVCSB is committed to providing recovery-based services that are consumer centered and directed to all individuals needing services.

IV. Statement of Need

The following are the functional specs to create the requirements:

Functional Areas

- A pre-defined library of competencies to select from.
- A section for individualized goals.
- The ability to store previous year's evaluations for review.
- The ability for 360 input from peers and supervisors. Selection to be made by the supervisor and ability to have input remain anonymous.

- The ability to interface with Outlook and send email reminders as due dates approach.
- The ability to include notes, both supervisor and employee, throughout the year.
- The availability of the system to have split screens to allow appraiser to see for example current appraisal vs. previous years or see responses to 360 evaluations.
- The ability to create and/or maintain Job Descriptions.
- The availability of Job Descriptions to view by the employee and the supervisor.
- Describe how changes to the Evaluation are incorporated into the Job Description.
- The ability to set weights and compute a total weighted score for each employee.
- The ability for supervisors to see weighted scores for each employee at the same time (for comparison purposes).
- The ability to interface with payroll budgets. This will allow supervisors to know if weighted averages of all employees are within budget allowance.
- The capability to support lump sum or one time bonuses.
- The ability to support off-cycle compensation events, such as career ladder movement or additional increases due to licensure.
- The ability to allow for approval of requested merit increases by the supervisor's chain of command and the ability for the chain of command to make/change the recommended merit increases.
- The ability for HR to easily create their own reports.
- The ability to report by program up to larger department/division.
- The ability to provide reports indicating possible areas of training needed by employees.
- The capability to export report results into Excel.

The following are the technical information and infrastructure requirements:

Technical Information & Infrastructure Requirements

In this section, CVCS is looking for detailed technical information about your software solution as well as the infrastructure requirements needed to successfully deploy your application. Please detail the hardware, network, and communication infrastructure requirements needed to support your application as well as any other technical information you deem necessary to understand how to fully deploy and support your application.

Training, Implementation, Support, Data Conversion, & Software Upgrades

In this section, describe your organization's typical approaches to training, implementation, support, data conversion, and software upgrades. Include the following detailed information in this section:

- The number of full-time equivalent (FTE) staff members you have in each of these operational areas.
- Information on a typical implementation services, including key tasks, timelines, and staff members involved both from your organization and the purchaser.
- The operations of your Help Desk, including information on 24/7 availability, how calls are prioritized, response times, whether the caller has routine access to live staff and all other information of interest to a customer.
- Any other technical information you deem necessary to understand how to fully deploy and support your application.

- Information about how customers are involved in the software enhancement decision process and how frequently upgrades occur.
- How requests for customization of the software are handled.
- What are the hours and methods (phone, e-mail, and web) of support for each type of technical support?

Report Writing Capabilities

In this section, please describe the report writing capability of your technology solutions, including a listing and description of standard reports, export capabilities, and compatibility with other applications, ease of use, etc. Specifically, CVCS desires the following key elements in a report writer:

- A report-writer interface that is comprehensive and easy to use, allowing reporting on all data elements in the system.
- Ability to write custom reports and write and use stored procedures.
- Data-warehouse and data mining capabilities.
- A data dictionary and supporting documentation.
- An extensive library of reports, with commonly used queries and sorts, which can be customized as needed by the customer.
- Ability to save and name report templates.
- Ability to run reports in batches.
- Ability to run reports or report batches at scheduled times.

Software Interface & Data Exchange Capabilities

In this section, describe your organization's expertise in interfacing with common general ledger and human resource applications. Note that CVCS uses the following general ledger and human resources software applications:

- Sage MIP
- ABRA (SQL version)

Cost

In this section, detail the cost for your software technology solution. The information should clearly distinguish between one-time and on-going costs and include an easy-to-understand summary of the expected costs for each of the first three years. The organization has an annual budget of roughly \$35 million. Assume the following user counts for CVCS:

- Number of Active Staff : 800

V. ADMINISTRATIVE AND MANAGEMENT SERVICES:

- a. The Contractor shall provide the following on all invoices to CVCSB (Accts Payable) as follows:
 1. PO #, which will be **RFP #JG020911**
 2. Segment Codes/Distribution Tables (will be provided once this contract is awarded)

VI. Reference Documents

Offerers are responsible for familiarity, as well as compliance, with any and all Commonwealth of Virginia or Federal statutes, regulations, or other applicable legalities or ethics related to the software industry.

VII. Proposal Preparation and Submission Requirements

A. General Instructions

1. Proposals shall not be extensive but shall convey enough information for the Agency to evaluate the ability of your firm to provide the requested services. Proposals must contain the following, in this order:
 1. Letter of transmittal
 2. Table of contents
 3. Brief description of the firm(s)
 - History
 - Principals
 - Qualifications to undertake this project
 4. Sample/review of your performance appraisal system on CD
2. Proposals are to be returned to the Purchasing Office, Central Va. Community Services, 2241 Langhorne Rd, Lynchburg, Virginia 24501.
3. The original Request for Proposal must be returned with your proposal and signed.

B. Specific Instructions

1. In order to be considered for selection, offerors shall submit a complete response to this RFP. One **(1) original**, four **(4) copies**, and **(1) CD** of each proposal are to be submitted.
2. All proposals shall be returned in a **sealed** envelope clearly marked **RFP #JG020911 PERFORMANCE APPRAISAL SYSTEM**. Proposals shall be signed by an authorized representative of the offeror. Courier and regular mail packages shall be clearly marked as to the contents.
3. Vendors that will be performing services at a CVCSB site must be able to present Certificates of Insurance stating a minimum of 1 million dollar General Liability and Workers Compensation in the statutory amount. Such certificates will only be required of the successful firm.

VIII. Contract Award and Development

- A. The Competitive negotiation method of selection will be used to determine the most qualified offeror among those submitting proposals. Proposals will be evaluated in accordance with the "proposal evaluation criteria" in the RFP.
- B. The content of the RFP and the successful offeror's proposal will become an integral part of the contract, but may be modified by provisions of the contract. Offerors must be amenable to inclusion in a contract of any information provided either in response to this RFP or subsequently during the selection/negotiation process. The information received will be considered contractual in nature and will be used in validation and evaluation of proposals and in subsequent contractual action.

IX. Proposal Evaluation Criteria

Proposals will be reviewed in accordance with the following evaluation criteria; however not in this order:

1. Ability to comply with CVCSB terms & conditions
2. Delivery time
3. References
4. Experience in providing like services to similar entities
5. Depth of Response
6. Pricing
7. Return Policy
8. Reporting/Invoicing

X. Pricing

The subsequent contract will be a firm-fixed price agreement. The fee(s) will remain firm and will include all charges that may be incurred in fulfilling the requirements of the contract through the first contract year from the awarded date. Changes in cost for any subsequent contract years will be based on the Consumer Price Index for the Central Virginia area.

XI. General Terms and Conditions

- A. Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to the agency. This will provide an opportunity for the offeror to clarify or elaborate on the proposal. The agency will schedule the time and location of these presentations. Oral presentations are an option of the agency and may not be conducted. Therefore, proposals should be complete.
- B. No member of the governing body, officer, or employee of Central Virginia Community Services during his/her tenure or for one (1) year thereafter shall have any interest, direct or indirect, in this contract or the proceeds thereof.
- C. The agency reserves the right to accept any proposal or to reject any or all proposals.
- D. Central Virginia Community Services may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the work, and the offeror shall furnish to the agency all such information and data for this purpose as may be requested. The agency reserves the right to inspect offeror's physical plant prior to award to satisfy questions regarding the offeror's capabilities. The agency further reserves the right to reject any offer if the evidence submitted by, or investigations of, such offeror fails to satisfy the agency that such offeror is properly qualified to carry out the obligations of the contract and to complete the work contemplated therein.
- E. All proposals submitted under the RFP will become the property of the Central Virginia Community Services Board and will not be returned. In accordance with the Virginia Public Procurement Act: "Trade secrets or proprietary information submitted by a bidder, offeror, or contractor in connection with a procurement transaction shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the bidder, offeror or contractor must invoke the protections of this section prior to or upon submission of the data or other materials, and must identify the data or other materials to be protected and state the reasons why protection is necessary."
- F. The Central Virginia Community Services Board will not be responsible for any expenses incurred by a potential offeror in preparing and submitting a proposal.

- G. Proposals received after the date and time stated will not be considered. It is the responsibility of the offeror to see that his proposal is received in the Purchasing Office by the specified time and date. Date of postmark is not considered. Telephone, telegraph and facsimile proposals are not acceptable.
- H. It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- I. By submitting a Proposal, the Offeror covenants and agrees that he has satisfied himself, from his own investigation of the conditions to be met, that he fully understands his obligation and that he will not make any claim for, or have right to cancellation or relief from the contract because of any misunderstanding or lack of information.
- J. Payment shall be made upon 30 days receipt of accurate and complete monthly statements.
- K. By signature on this solicitation, bidder certifies that it does not and will not during the performance of the Contract employ illegal alien workers or otherwise violate the provisions of the Federal Immigration Reform and Control Act of 1986.
- L. By written notice to the Contractor, Community Services may from time to time make changes, within the general scope of the Contract, in the services provided by the Contractor. The Contractor shall promptly comply with the notice and shall perform services in conformity to the notice. If any such change causes an increase or decrease in the Contractor's cost of performance, an equitable adjustment in the payment rate shall be negotiated and the contract modified accordingly by written supplemental agreement.
- M. Failure to submit a Proposal on the form provided for that purpose shall be a cause for rejection of the Proposal. Return of the complete document is required. Modification of or additions to any portion of the solicitation may be cause for rejection of the Proposal; however, CVCSB reserves the right to decide, on a case-by-case basis, at its sole discretion, whether or not to reject such a Proposal as nonresponsive.
- N. CVCSB reserves the right to conduct any inspection it may assume advisable to assure supplies and services conform to the specifications.
- O. Any payment terms requiring payment in less than thirty (30) days will be regarded as requiring payment thirty (30) days after invoice or delivery, whichever occurs last. However, this shall not affect offers of discounts for payment in less than thirty (30) days.
- P. In case of failure to deliver services in accordance with the contract terms and conditions, CVCSB, after due oral or written notice, may procure them from other sources and hold the Contractor responsible for any resulting additional purchase and administrative costs.
- Q. A contract shall not be assignable by the Contractor in whole or in part without the written consent of the Chief Executive Officer of CVCSB.
- R. By submitting their proposals, all Offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or

inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their Proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.

- S. The agency reserves the right to cancel any subsequent contract at any time the agency, at its sole discretion, deems it to be in the agency's best interest to do so by giving the contractor 30 days written notice. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver or perform on all outstanding orders issued prior to the effective date of cancellation.

- T. By submitting their proposal, all bidders and offerors certify to the Central Virginia Community Services Board, Virginia that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians with Disabilities Act, The Americans with Disabilities Act, Section 11-51 of the Virginia Public Procurement Act, and the Lynchburg Procurement Ordinance.
 - 1. During the performance of this contract, the contractor agrees as follows:
 - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex or national origin, except where religion, sex or national origin is a bona fide occupational qualification reasonable necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

 - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.

 - c. Notices, advertisements and solicitations placed in accordance with Federal Law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.

 - 2. The contractor will include the provisions of the foregoing paragraphs a, b and c in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

- U. By submitting their proposal/bid, all bidders and offerors certify to the Central Virginia Community Services Board that: During the performance of the contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) 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 contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase

order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

- V. CVCSB reserves the right to award a contract to a bidder based on "best value" (as defined in the Virginia Public Procurement Act, July 2009), which means the overall combination of quality, price, and various elements of required services that in total are optimal relative to the needs of CVCSB.

IN COMPLIANCE WITH THIS REQUEST FOR PROPOSAL AND TO ALL THE CONDITIONS IMPOSED HEREIN, THE UNDERSIGNED OFFERS AND AGREES TO FURNISH THE SERVICES IN ACCORDANCE WITH THE ATTACHED SIGNED PROPOSAL OR AS MUTUALLY AGREED UPON BY SUBSEQUENT NEGOTIATION.

Company Name and Address:

_____	Date: _____
_____	Name: _____ Signature in Ink
_____ ZIP _____	Title: _____
Telephone: _____	Print Name: _____
Fax: _____	
Email: _____	