

Cleveland County, North Carolina

Request for Proposals

LEARNING MANAGEMENT SYSTEM

RFP Issued: April 5, 2022

RFP SUBMISSION DEADLINE: 4:00 PM on April 26 ,2022

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RFP Information

Proposals due: **4:00PM on April 26,2022**

Projects must be delivered electronically to:

Kim Lester
kim.lester@clevelandcountync.gov

Any questions regarding training within Cleveland County may directed to Hugh Sandoe at hugh.sandoe@clevelandcountync.gov.

Project Location:

Cleveland County, NC

Project Description:

Acquisition, implementation, and training of online learning management system that is compatible with Keystone Information System Payroll/ERP application including continuing support.

Cleveland County (“The County”) seeks to identify a potential vendor and pilot the training software with an entire organization launch on July 1, 2022. This target date may be adjusted if needed.

Opening of Proposals:

Proposals, modifications, or corrections received after the closing time on **April 26, 2022** will be considered late and will not be opened. If only one proposal is received in response to the RFP, the County staff may either make an award or, re-solicit for the purpose of obtaining additional proposals at their discretion. Cleveland County reserves the right to reject all proposals.

Introduction

Located in the southwest portion of North Carolina, Cleveland County is home to approximately 100,000 residents across 469 square miles. Conveniently located between the two major metropolitan areas of Charlotte and Asheville, North Carolina. The county has, and is expected to continue experience tremendous growth with being home to many manufacturing companies and its convenient location.

Cleveland County is led by five elected County Commissioners who appoint a county manager to oversee the daily operations of the organization. The county employs approximately 750 full time employees across 25 departments within the organization to provide efficient and effective services to both citizens and visitors. These employees are located in various offices and locations across the county.

With 20 departments and a variety of staff, the County has robust operational challenges as it relates to ensuring high quality training and performance improvement.

Purpose

As Cleveland County is a high performing organization, the county seeks an online learning management system (henceforth LMS) to deliver, track, and create training programs in a variety of topics.

Cleveland County is seeking proposals from responsive, responsible, highly qualified, and experienced vendors of Learning and Performance Management. This Request for Proposals seeks vendors who can provide a robust learning and performance management tool that will substantially meet the technical requirements and the business requirements as set forth in this document.

Conversations about learning and development have taken place consistently within Cleveland County over the past few years. The focus of these conversations has historically revolved around efficiency, content, and participation. The county has relied primarily on face to face trainings, which limits the amount and frequency trainings can be offered during a given year. With current county priorities focusing on staff engagement, professional development, and innovation, it was determined that acquiring a learning management system is essential to creating a more dynamic and versatile workforce.

As Cleveland County has not used an electronic training solution before, the desired vendor must be able to provide training for front-line, supervisor, and administrative employees to aid in the implementation of the system. The LMS system must be able to import and export information into Keystone, the County's core HRIS system.

Response Format

Respondents should submit, in electronic format, a document which includes the following sections:

- Executive Summary
- Company Background
- Client References
- Scope of Work
- Implementation Methodology
- Support
- Cost Proposal

Executive Summary

The Executive Summary should include a brief overview of the Proposal. It should be prepared in such a manner as to make it understandable to individuals not familiar with the terminology specific to this type of project.

Company Background

The Company Background should provide vendor information including but not limited to:

- Company headquarters information
- Company history

- Description of products and services provided
- Experience with government customers

Client References

Vendors must supply at least three (3) public sector sites that are currently using a similar system requested by the County. Please provide the

- Entity name
- Address
- Contact name
- Phone number
- Dates of engagement with the client

Scope of Work

The vendor is encouraged to recommend any enhancements to the minimum requirements stated below that will improve the overall performance and usability of the system. The desired solution shall have two core functions:

- Learning Management System
- Employee Evaluation System

Learning Management Function Shall Have The Ability To:

- Report course completion and progress status
- Assign courses by groups, divisions and or individuals
- Upload new courses including adding outside vendor courses to the course catalog
- Delete or deactivate a course
- Archive completed courses
- Search courses by keyword or title
- Manage courses in bulk – ability to open, close and remove courses in bulk
- Track employee learning including individual learning or training plans
- Match the competency library to the competencies in the courses
- Send notifications for courses and classes
- Send notifications when courses are completed and when uncompleted courses are nearing their due date.
- Develop online training courses with video, audio, and assessment functionality
- Design learning paths for various classes of employees
- Integrate with external SCORM based training content
- Administer training in a remote environment
- Ability to create and maintain electronic training courses and material
- Ability to track employee training administered with the system as well as training and certifications that are external to the system
- Ability to create and manage virtual training cohorts

Performance Management (Appraisals) Shall Have The Ability To:

1. Launch Performance Appraisals (individual and bulk)

2. Notify employees and managers via email (auto-notification) when performance appraisals are signed and completed
3. Allow employees to create their own Individual Development Plans (IDP's)
4. Allow employees to upload documents and to match up courses/competencies to their IDP
5. Ability to create learning paths based on competencies
6. Report performance appraisal statuses and scores including the ability to view
7. Allow the export of performance appraisals in report form (PDF)
8. Employee self-evaluation
9. Supervisor evaluation
10. Track evaluations for all employees

Reporting Function Shall Have The Ability To:

1. Create and export custom reports using for more detailed analysis
2. Use dashboard reporting to provide at a glance visual of the data
3. Allow filtering based on the different categories. Example: by task, by function, by division, or by employee

Solution Shall Have The General Ability To:

1. Upload and attach documents in PDF and Word formats such as position requisitions, justifications, and proof of completed training.
2. Mobile device compatible so that applicants, employees, and managers can have access using mobile devices (phones, tablets etc.)

Learning Catalog

If the product includes or can include an existing library of training, the following should be included in the project proposal:

- Total number of courses
- Average length of each course
- List of common courses, including course descriptions
- Key topical areas or learning paths, if applicable
- Common course catalogs that could be purchased as a bundle

Implementation Methodology

The selected Vendor is expected to assign a Project Manager, to work alongside the County's appointed project manager. The proposal should explain the typical roles and tasks assigned to both the county and the Vendor, including estimated time commitments.

Both the County and the Vendor will be responsible for working in a cooperative manner to meet the targeted timelines outlined in the implementation plan. The County will hold the Vendor responsible for meeting key milestones that were agreed upon by both the County and the Vendor. The County reserves the right to conduct any test/analysis it may deem advisable to ensure deliverables for each milestone conform to specifications. The County and the selected Vendor will mutually agree upon any changes to the schedule.

Cleveland County expects a comprehensive turnkey solution that will be completed within a mutually agreed time decided by Cleveland County Human Resources Department and the Vendor. Cleveland County expects the Vendor to have an implementation plan that ensures

success in these areas: Installation, data conversion, configuration, integration, testing, user acceptance, training, security, system performance, and implementation.

The County and Vendor will agree upon project milestones that the County will hold the Vendor accountable for meeting. Payments will be tied to the completion of certain key milestones. The initial payment at signing cannot exceed the amount of the final payment upon successful implementation of the solution.

Example Payment Milestones:

- 30% at Start of Project
- 20% after Data Conversion/System Configuration
- 20% after User Acceptance
- 30% Successful Implementation

The Vendor is not held liable for violation of the time-to-implement requirement if the actions of Cleveland County result in a project delay. The reasons for delays must be described and submitted to Cleveland County in written format within three weeks of the incident.

Project Implementation Questions:

1. What is the typical number of weeks from contract signing to go-live? Keep in mind that we want adequate time for User Acceptance Testing of the system. Our expectation is that training will not be scheduled until we have accepted the system.
 - Will the Vendor or County be responsible for the installation of the solution?
 - Have you ever converted data from Keystone Information Systems?
 - What methods do you use to convert data?
 - What is your plan for how data conversion is tested and accepted by the customer?
 - Do you have a typical configuration plan?
 - What methods do you use for integrations with other systems, including external training content?
 - What is your Quality Assurance process for conversion and any enhancements or configurations? (i.e. Do you test it before we do, or does our Project Team have to do QA testing?)
 - What is your process for User Acceptance Testing?
 - Do you provide test plans and test scripts for User Acceptance Testing?
 - What is your training plan/methodology? The training plan must provide a statement of training objectives for each application stating what subjects are to be covered, what the trainees are expected to be able to do at the end of the session, and the amount of training time that will be provided for each application.
 - What resources do you provide on and off site during implementation?
 - Describe your process for program enhancements or changes.
 - Do you have user group meetings? If yes, how often and are the meetings regional or national?
 - How are software modifications common to all Vendor customers requested, prioritized and funded? (i.e. through User groups or other means, costs included in maintenance or funded some other way)
 - How are the priorities of common enhancements determined?

- How are desired custom modifications handled?
- What additional hardware, if any, will the County need to purchase?
- Does client have the right to download their data at any time?
- Can client automate the backup and download of their data?

Support

The Vendor will provide the following Support information:

- Support Options
 - Does the Vendor provide a toll-free support number?
 - Does the Vendor provide Online Support?
 - Who from the County may contact Support?
 - What business hours is live support available?
- Support Goals
 - Please provide Response Times and Service Level Agreements
 - Who is responsible for hardware and system software maintenance?
- Who is responsible for hardware and system software support?
- System Updates
 - How are updates managed?
 - How often are updates released?
 - What is the typical downtime during an update?
 - How long will we be able to use the version being implemented before having to do an upgrade?

Cost Proposal

Provide a total cost proposal for all products and services to be delivered, and a breakdown of costs delineated by one-time, ongoing, and annual costs for products and services as described in your proposal. Amounts should contain no taxes and include all transportation and delivery to the County. All costs shall be in actual dollar-and-cent amounts. Please provide best estimate for travel costs and other miscellaneous items.

The proposal pricing must remain in effect for at least one hundred and twenty (120) days after the date of submission.

As the County may enter into a multi-year service agreement, the vendor should outline anticipated costs for the first three years, as well as typical annual renewal increases thereafter. To the extent desired, additional recommendations and services or options may be included as additions to the project on an optional basis. These optional items shall be priced separately from this Request for Proposals.

All prices shall be firm and not subject to increase during the period of the Contract.

The Cost Proposal is to be a fixed price proposal and must include and itemize the following:

- Cost for named or concurrent user license per module, if appropriate
- Cost for installation of any additional system software
- Cost for project management and professional services

- Cost for license and implementation of third party software
- Cost for training
- Costs for included or additional course catalogs
- Cost for maintenance
- Cost for travel and expenses
- Cost of converting existing data, including file preparation, to the proposed system
- Cost of annual maintenance for all modules and third party software, including the date(s) such annual maintenance is due
- Annual cost for continued operation and maintenance of the entire system
- Estimated costs for any additional hardware required
- Recommendation for additional staff required to support the application
- Additional costs for reporting and/or other customizations
- Total cost to implement

Evaluation Process

The County shall evaluate proposals through a three stage process: RFP document review, virtual or in person product demonstration, and a short term trial period. The County wishes, if available, 2-3 weeks of access to the product in a demonstration mode, to utilize self-paced product discovery.

Primary Evaluation Factors:

1. Response to RFP and Questionnaire:

- Compliance with Bid Requirements
- Ability to meet mandatory specifications
- Interface with existing systems
- Software functionality
- Cost of system and ongoing support
- Agreement to contract requirements
- Qualifications of the Vendor
- Quality of project management and training services
- Quality of system support
- Satisfactory implementation plan
- Sustainability of Technology

2. Self-paced product testing

- Functionality
- Ease of Use

3. Course Catalog

- Quality of tested courses
- Quantity of courses included

4. References:

- Existing customer satisfaction with products, maintenance, support, and overall company
- Proven track record to provide services as promised
- Appropriate level of robustness and complexity of software for the County's purposes
- Project management

- Training
- 5. **Additional Evaluation Factors:**
 - Demonstrated commitment to product longevity and enhancement
 - Organized system for obtaining customer input
 - Company policy regarding software modifications for mandated state/federal changes
 - Long term viability of the company

Product Demonstration Process

The County at its sole discretion may ask the Vendor to make an oral presentation or to demonstrate all functions of their software at County facilities without charge to the County. The demonstration of software should include but is not limited to the following elements:

- Vendor introduction and background.
- Explanation and demonstration of how users navigate through the system.
- Demonstration of how the solution meets our business requirements.
- Demonstrate/discuss how reporting needs will be met
- Reports included with the solution
- Sample Individual Development Plan, if the solution supports that function
- Reports that users can create using a reporting tool that is part of the solution
- Demonstration of any unique design concepts or user features which the Vendor would like to illustrate.
- Explanation of system design concepts related to:
 - Technical configuration and master files,
 - Functionality of major processes,
 - Technical System Administration (i.e. – how the application is installed and supported on the platform recommended in the proposal),
 - User System Administration (i.e. – how users are added, security granted, etc. for all components of the proposed solution).
- Demonstration of support tools and processes.
- Demonstration of user capability to modify screens, reports, forms, etc.
- Data Conversion
 - Data conversion services provided
 - Timelines
 - Provide an implementation Gantt Chart
- Timeline
 - Use the implementation timeline focusing on launching pilot departments in January and organization launch on July 1, 2022. Please include estimated hours of both vendor and county staff time needed to dedicate to a successful conversion process.

SELECTION PROCESS

All materials submitted in response to this RFP will automatically become the property of the County, which reserves the right in its sole discretion to use, without limitation, any and all information, concepts, and data contained therein. The sole point of contact with the County

concerning information about this RFP and the subsequent selection process will be the Human Resources Department. Disregard of this directive may disqualify the proposal involved. On an initial review of the proposals, those judged to be responsive to the specifications set forth in this RFP will be evaluated in detail, based on criteria set forth in this RFP.

The County may request an oral presentation at its option if clarification of proposal content is needed. Respondents will be contacted if necessary; respondents are not to contact the County to request a presentation be scheduled. RFP responses should be thorough. If a response requires an inordinate amount of clarification, it may be disqualified.

The County will negotiate with the successful Vendor, felt to provide the best service to the County, based on technical ability and the most beneficial cost for the work proposed. Should agreement for services not be reached and a contract signed by the selected Vendor within a time limit set by the County, then the County reserves the right to negotiate with any or all Vendors submitting proposals under this request.

Subsequent award as a result of this Request for Proposals is subject to Cleveland County Information Technology Department approval.

General Comments

- Any cost incurred by the respondents in preparing and submitting a response to the RFP shall be the respondent's sole responsibility.
- All responses, inquiries, or correspondence relating to this RFP will become the property of Cleveland County when received and will not be returned.
- Cleveland County reserves the right to accept or reject any submittals.
- Cleveland County reserves the right to award contracts as it deems will best serve its interests, including award of the services being sought to one or more of the applicants.
- Any questions relating to the RFP should be directed to Hugh Sandoe at hugh.sandoe@clevelandcountync.gov