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**Talent Management System**

Request for Proposals

**Reference 0804201312547**

Proposal Submissions Due: May 13, 2013, 5 p.m., EDT

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# Project Overview

FHI 360 is a nonprofit human development organization dedicated to improving lives in lasting ways by advancing integrated, locally driven solutions. Our staff includes experts in education, health, nutrition, economic development, civil society, environment, gender, youth, research and technology – creating a unique mix of capabilities to address today's interrelated development challenges. FHI 360 serves more than 60 countries and all U.S. states and territories. For more information, please visit www.fhi360.org.

In July 2011, the teams of experts from Family Health International and Academy for Educational Development came together to create FHI 360. The new combination presents a great opportunity to more effectively advance our mission by improving our talent management. In addition to recruiting, applicant tracking, requisition management, compliance reporting, and housing of employee resumes and skills data, we are also trying to use the current system for both formal and informal internal staff skills identification data management.

FHI 360 seeks an integrated web-based solution that meets the requirements listed below and must:

* be globally accessible by applicants and recruiters
* support job requisition submission and approval, job posting and advertising, applicant searching, submission receipt and tracking, processing and communications, new hire communications (internal partners) and proper decision-making documentation
* support the Employee Skills Inventory and the identification of workforce availability
* meet all U.S. Federal compliance requirements and include Federal reporting capabilities as standard features
* include standard reports to support Human Resources (HR) and hiring managers
* provide configurable controls and reports
* provide easily customized, real-time reporting/analytics features for HR staff
* provide role-based access and permissions

In addition, the Vendor should indicate possible (add-on) solutions for resource management and learning management.

# Bid Protocol

This is an open competition that consists of two main parts:

* A written proposal made up of a technical approach, a cost proposal, and an FHI 360 Supplier Information form signed by an authorized official of your firm (see **Appendix A**), to be submitted by all Vendors interested in bidding on this project.
* Demonstrations to be made by those Vendors short-listed for consideration.

*Directions for preparing each of these parts follow the Statement of Work, below.*

## Submitting the Proposal

Sealed packets containing one signed original and one copy of the technical approach, cost proposal and Supplier Information form must be received at the address below by 5 p.m. (EDT), Monday, May 13, 2013. An electronic emailed submission, in MS Word or Adobe PDF and Excel, is also required and should be sent via email to Lynda Barbour ([lbarbour@fhi360.org](mailto:lbarbour@fhi360.org)) and Bob Mohar ([Bmohar@FHI360.org](mailto:Bmohar@FHI360.org)). Responses received after the time specified will not be considered. Please ensure to add reference number 0804201312547 on all proposals.

No response will be considered if it is not accompanied by the FHI 360 Supplier Information form, which must be signed by an authorized official of your firm.

## FHI 360 Contacts

**The signed original and copy should be sent to**

Lynda Barbour

Business Solutions, ISS

FHI 360

1825 Connecticut Ave. NW

Washington, DC 20009

lbarbour@fhi360.org

**Purchasing Questions**

Bob Mohar

Director, Purchasing and Facility Services

FHI 360

PO Box 13950

Research Triangle Park, NC 27709

(919) 405-1455

[bmohar@fhi360.org](mailto:bmohar@fhi360.org)

Your response will be distributed internally at FHI 360 only to the extent necessary for evaluation by the proposal team. Unique information contained therein will be treated as proprietary and confidential. Further, information specific to FHI 360 systems and capabilities is proprietary and confidential. It is provided solely for your use in developing a response to this RFP.

## Question and Answer Period

Send questions about this RFP to FHI 360 by 5:00 p.m. (EDT), April 15, 2013.

Submit questions to Lynda Barbour, Business Solutions ISS [lbarbour@fhi360.org](mailto:lbarbour@fhi360.org) and copy Bob Mohar, Purchasing and Facility Services [Bmohar@fhi360.org](mailto:Bmohar@fhi360.org). Please, no phone calls or in-person visits. Answers to these questions will be sent by email to all potential respondents by 5:00 p.m. (EDT), April 23, 2013.

Selection Date

FHI 360 anticipates selection to be completed on or about June 28, 2013.

## Timeline

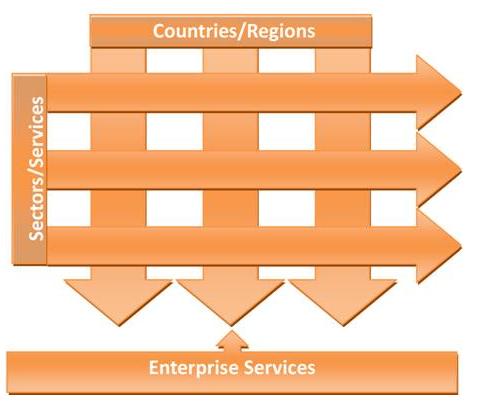
|  |  |
| --- | --- |
| **FHI 360 Talent Management RFP**  **Relevant Deadlines** | |
| **Event** | **Deadline** |
| Questions from Vendors re: the RFP | Monday, April 15, 2013, 5:00 p.m. EDT |
| Answers out to Vendors | Tuesday, April 23, 2013, 5:00 p.m. EDT |
| Proposals due | Monday, May 13, 2013, 5:00 p.m. EDT |
| Invitations sent to selected Vendors for demonstrations | Thursday, May 23, 2013 |
| Anticipated Award of Contract | On or about Friday, June 28, 2013 |

## Additional Proposal and Award Information

* Vendors must address a plan to accommodate all the elements described in the High Level Requirements of the Statement of Work.
* Responses that modify, in any manner, the provisions or requirements outlined in this Request for Proposals (RFP) may not be considered.
* Respondents are asked to provide three references. Including related reference material is encouraged. FHI 360 is an international nongovernmental organization (INGO); references should reflect work with similar organizations where available.
* FHI 360 will ensure that small business enterprises—including veteran, woman and minority owned—will be afforded full opportunity to submit information in response to this RFP. Respondents will not be discriminated against on grounds of age, race, color, gender, creed, national origin, religion or disability.
* All respondents shall comply with the Americans with Disabilities Act and North Carolina Fair Employment Practices Act.
* Upon selection, FHI 360 will negotiate contract terms based upon information that may be derived directly from your response. All contracts are subject to review by FHI 360 legal counsel, and the project will be awarded upon signing of an agreement or contract that outlines terms, scope, budget and other necessary conditions.
* Costs of developing the proposal, information package, oral presentations, demonstrations, site visits or any other such costs are entirely the responsibility of the respondent and shall not be reimbursed in any manner by FHI 360. FHI 360 is not liable for any costs incurred by the Vendor in response to this RFP.

# About FHI 360

In July 2011, the teams of experts from Family Health International and Academy for Educational Development came together to create FHI 360. FHI 360 is a global development organization with a rigorous evidence-based approach. Our professional staff includes experts in health, nutrition, education, economic development, civil society, environment and research. FHI 360 operates from 60 offices with 4,500 staff in the United States and around the world. Our business is based on a matrix model that intersects the work managed in sector, service, country (60 countries including the United States) and regional offices.  Enterprise services provide centralized support for country, regional, service and sector groups. This design allows FHI 360 to work together effectively in a cost-efficient manner and allows the organization to respond to the needs of our funders and beneficiaries.



FHI 360’s offices cover a broad spectrum of environments. We work in resource-limited settings around the globe where infrastructure varies drastically. Office structures range from regional centers with broad representation of corporate functions to small offices in rural areas with minimal staff.

The majority of FHI 360’s funding comes from the U.S. Federal Government (primarily USAID, CDC and DHHS), but we also work with state and local governments, foundations (e.g., The Bill and Melinda Gates Foundation), multilaterals (UNICEF) and other non-U.S. governments (DFID). USAID is our cognizant agency.

FHI 360 is primarily a service organization. Labor is our largest expenditure, followed by sub-contracts and grants and travel expense. All expenditures are subject to the rigors of U.S. Federal Government regulations and audit requirements.

# Statement of Work

## 

## Project Background

Currently, FHI 360 uses Taleo Business Edition, implemented in 2008. As a growing organization with a portfolio of $650M, FHI 360 needs a solution to match our current and future requirements. The current Taleo Business Edition subscription expires in March 2014.

The FHI 360 Talent Management System plays a key role in building our capacity to provide the expertise required for delivering services to our partners and clients. We have identified four key areas to improve our talent management:

* Applicant Tracking
* Consultant Tracking
* Employee Skills Inventory and Availability
* Reporting and Compliance

The Talent Management System should provide easy-to-use interfaces for submitting applications, searching, reporting and collecting data.

In addition, we are interested in exploring solutions for the following areas:

* Resource Management
* Learning Management

## Project Objectives—Overview

**Implement a New Talent Management System**

The new FHI 360 Talent Management System will need to support over 4,500 geographically dispersed staff, and over 100,000 applicant and consultant records. It must be easy to use, maintain, and administer; provide role-based access for searching and reporting; and be a configurable, scalable solution that can adapt to our hiring management processes and accommodate our evolving needs as our organization grows and our processes change.

* **Applicant Tracking System** – Central, efficient work flow processes for job requisitions, applicant tracking, and management of employee referral and transfer programs. The system should provide a professional, easy-to-use applicant experience to attract interested candidates. Applicants should have the ability to apply to a specific job posting or expression of general intent. Other high level requirements include searches on all application data points, by specific parameters, and resume attachments.
* **Consultant Tracking** – Easy-to-use online consultant application process. Staff should be able to search consultant data that match opportunities. Consultants should be able to manage their profile.
* **Employee Skills Inventory –** Easy-to-use inventory system that captures employee skills via customizable FHI 360 common vocabulary with role-based access for searching and reporting. We also seek a solution to identify the availability of an employee for workforce planning and scheduling.
* **Reporting and Compliance –** Robust reporting that enables users to run ad hoc reports and save criteria for future use, as well as run industry standard reports. This includes reports used to represent company capabilities such as number of staff with certain skills, education levels, etc.

We are also interested in resource and learning management, and would like the Vendor to indicate solutions they might have in these areas.

* **Resource Management –** As a service organization, our greatest resource is our staff. We are interested in a solution that may have the ability to manage workforce planning, availability and expertise. Explain how the proposed solution offers assistance in this area, including linking to other HRIS and financial systems.
* **Learning Management –** FHI 360 provides learning and development events and opportunities to staff. Currently, we use the Intralearn solution provided by Lingos. We are interested in a system that is SCORM compliant, and provides course/event catalogue management, training/event management, self-service registration, provides standard, custom, and ad-hoc reporting capabilities, and links to Active Directory for authentication and Workday employee records.

# Project Scope

The project scope, below, is an overview of the High Level Requirements to which Vendor proposals should respond.

FHI 360 expects this response to include the description of a phased approach project plan, including milestones and dates that will ensure project completion before the Taleo Business Edition subscription expiration in March 2014.

## High Level Requirements

Below is a summary of high level requirements. Our vision is to have an integrated talent management system that is globally accessible 24/7.

# Applicant Tracking

**Synopsis:** The Applicant Tracking system is FHI 360’s face to potential employees. The interface must be easy to use, globally accessible and easily customizable to reflect FHI 360’s identity. The system must also meet HR recruitment workflows and business processes.

* **Requisitioning,** to include job description management, approval workflow, and job board and social media posting.
  + HR and hiring managers should be able to create, read, update and delete job requisitions.
  + HR and hiring managers should be able to manage approval workflow for job requisitions.
  + HR should be able to post to job board and social media.
  + HR and hiring managers should be able to create, edit, import and copy requisitions.
  + HR and hiring managers should be able to store and retrieve job requisition information.
* **Applicant workflow,** to include communications/correspondence management, interview management, background checking and onboarding.
  + Applicants should be able to attach multiple documents, such as resumes and cover letters, to selected job postings.
  + Recruiters should be able to manage and document the interview process, including scheduling, evaluation forms/documentation and notes (both open and confidential).
  + The system should generate email correspondence such as thank you letters, offer letters, rejections, on-hold notices, etc., using standard templates. The system should also have the ability to customize correspondence as needed.
* **Candidate acquisition,** to include self-service features, screening and assessment capabilities, referral management and scoring.
  + The system should have referral management capabilities, including social media.
  + The system should have candidate relationship management and sourcing capabilities.
  + The system should include support for OFCCP guidelines for Internet applications.

# Consultant Tracking

**Synopsis:**  As a service organization, FHI 360 utilizes consultants throughout the year. The interface must be easy to use, accessible globally and easily customizable to reflect FHI 360’s identity.

* Consultants resume and skills bank should include role-based searching and reporting for non-HR staff.
* Consultants should be able to attach multiple documents, such as resumes and cover letters.
* Consultants should be able to manage their profile and skills data via self-service features.
* Staff should be able to search consultant resumes and skills data, download results to Excel and download attached documents.
* Staff should be able to maintain notes on consultant profiles, and track and identify consultants that have been previously contacted and/or selected for a position.
* The system should have the ability to create custom data profile forms based on FHI 360 data needs.

# Employee Skills Inventory

**Synopsis:**  As a service organization, FHI 360’s asset is its intellectual capital. To meet our clients’ needs, inform our business and build our talent, we need a method of capturing our employee skills. The interface must be easy to use, accessible globally and easily customizable to reflect FHI 360’s identity.

* Employees should be able to attach resumes to skill profiles.
* Employees should be able to manage their profile and skills data via single sign-on (Active Directory integration).
* The system should be customizable to the FHI 360 taxonomy, and support nested data categories and metadata tagging.
* The solution should accommodate changing data categories and terminology.
* The solution should be able to map outdated terminology to new terminology once there is a change in the data tables.
* The system should have role-based permissions that allow employees to perform searches without access to personal, sensitive data.
* The system should track data searches and results (search archive) to help inform FHI 360 of talent gaps and skill shortages.
* The system should interface with Workday, our HRIS system.
* The system should help with identification of available resources and workforce planning.

# Searching, Reporting and Compliance

**Synopsis:**  FHI 360 staff will search the data to support a variety of tasks. The system needs to support role-based access to protect sensitive data, as well as match roles to workflow.

* The system should support regulatory reporting, including AAP, EEO and OFCCP.
* The system should support ad hoc, custom reporting.
* The system should support standard reporting and analytics.
* The system should be able to export reports and search results to Excel.
* The system should have an easy-to-use interface for searching, allowing simple and complex data searches, as well as keyword searches and multiple criteria filters to mine the data.
* The system should have the ability to search resume documents.
* The system should be able to generate reports representing company capabilities such as number of staff with certain skills, education levels, etc.

# Usability Requirements

**Synopsis:**  FHI 360 is looking for a system that is easy to use by staff, applicants, and consultants. The system should be available 24/7. As a global organization, FHI 360 has employees, consultants, and applicants from around the world, including areas with limited Internet connectivity. Usable interfaces should exist in all aspects of the system.

* The system should follow ADA Section 508 and W3C standards for accessibility.
* The user interface (UI) should enable the creation, view, update, saving or deleting of data at any point in a wizard process up to the point of submission.
* The UI should provide an audit trail and bread crumbs to inform the user what they have completed and what remains to be completed.
* **Training:** Describe staff training to support the solution/system/application.
* **Application Support:** Describe the technical support provided to the HR administrator(s).

# Infrastructure / Platform Requirements / Technical Support

**Synopsis:**  FHI 360 prefers a SaaS solution. The Vendor should address and describe the following technical items.

* The system should integrate with Active Directory in order to provide staff role-based access, and authenticate staff to their employee skill record, job requisitions and other workflow/business processes.
* The Vendor should be able to perform data migration of applicant, employee and consultant records from Business Edition of Taleo and the current custom Consultants database (SQL database) into the proposed solution.
* **Server:** Describe hardware, software, standards, certifications, storage for a SaaS solution.
* **Maintenance:** Describe any daily, weekly, monthly system operational procedures required to meet FHI 360 expectations for reliability.
* **Security:** Describe how authentication for the solution integrates with existing identity management solutions (Microsoft AD), and how security responses to vulnerabilities and patching for the solution are handled.
* **Backup:** Describe the backup and restore process for the solution.
* **Recovery:** Describe escalation procedures if support is required for 99.9% of the time (allows for 9 hours of downtime per year).
* **Hosting:** Describe requirement for detailed cost information related to licensing, support/maintenance and hosting fees.

In addition, we are exploring opportunities in Learning Management and Resource Management. If your system has the following capabilities, please provide us with information on how the proposed solution addresses these areas.

# Learning Management

**Synopsis:**  FHI 360 provides learning and development events and opportunities to staff. Currently, we use the Intralearn solution provided by Lingos. We are interested in a system that is SCORM compliant, and provides course/event catalogue management, training/event management, self-service registration, provides standard, custom, and ad-hoc reporting capabilities and links to Active Directory for authentication and Workday employee records.

# Resource Management

**Synopsis:**  As a service organization, our greatest resource is our staff. We are interested in a solution that may have the ability to manage workforce planning, availability and expertise. Explain how the proposed solution offers assistance in this area, including linking to other HRIS and financial systems.

# Basis for Award of Contract

Proposals will be evaluated on the basis of the following criteria and point ranges, for a **total of 100 points**:

1. **Responsiveness of the Technical Approach** in the High Level Requirements, demonstrating a clear understanding of the work to be performed, and ability to adhere to the expected timeline (30 points)
2. **Capability, Prior Experience** **and Key Personnel** (30 points)
3. **Cost Estimate** (40 points)

The FHI 360 evaluation team will be composed of representatives from all organizational entities that will be potential suppliers or consumers of information contained within the FHI 360 Talent Management System. Team members will evaluate each RFP response based upon their understanding of how the proposal meets FHI 360’s objectives and requirements, including but not limited to:

* Ability to meet the required functionality as detailed in the High Level Requirements without the need for customization
* Long-term total cost of ownership including: licensing and or hosting fees, annual support/maintenance fees, setup, configuration, customization, training and ongoing operation costs
* Project implementation methodology, phased implementation plan and data migration approach
* Vendor’s company history, including qualifications and availability of the proposed project implementation team and their related experience on similar projects as detailed in the High Level Requirements
* Vendor support model and team
* References of current users
* Bid presentation, including compliance with instructions
* Additional software modules or functionality not explicitly requested here that may be useful to FHI 360 after completion of the implementation of the FHI 360 Talent Management System

# 

# Preparing the Technical Proposal

INFORMATION REQUIRED FROM VENDORS

**Technical Proposal (60 points total)**

Technical Approach/Adherence to Project Timeline (30 points)

Capability, Prior Experience and Key Personnel (30 points)

## Technical Approach to the Statement of Work (refer to the High Level Requirements)

The technical approach describes in detail the Vendor’s response to the Statement of Work found in the High Level Requirements. This response includes suggesting a phased approach, milestones and dates that will ensure FHI completion before the Taleo Business Edition subscription expiration date.

1. Describe how the Vendor’s proposed technical platform meets FHI 360’s requirements.
2. Describe how the Vendor’s proposed solution will integrate with FHI 360’s corporate systems (Workday, Deltek, Active Directory, Microsoft Office 365 Suite).
3. Describe the Vendor’s proposed quality assurance, test and client acceptance processes.
4. Describe what guidance the Vendor provides on how best to establish security levels for the various FHI 360 stakeholders (i.e., HR Management, HR Recruiters, Employees, etc.).
5. Describe how the proposed solution meets standard security and employment compliance requirements.
6. Describe the Vendor’s data migration plan and approach. Include the Vendor’s past successes with data migration from Taleo Business Edition.

## 

## Project Timeline and Milestones

This response includes suggesting a phased approach, milestones and dates that will ensure completion before the Taleo Business Edition subscription expiration in March 2014.

|  |  |
| --- | --- |
| **FHI 360 Talent Management System**  **Milestones and Delivery Dates** | |
| **Suggested Milestone** | **Delivery Date** |
| Project Plan |  |
| Technical Strategy |  |
| Initial System Deployment |  |
| Data migration |  |
| Final System Deployment |  |
| Final Project Handover and Knowledge Transfer |  |
| FHI 360 Staff Training |  |

## Qualifications to Provide Services in the Statement of Work

Please indicate the following, not to exceed two pages:

1. Brief, general overview of the Vendor—size, number of staff, past experience/case studies in talent management systems for multi-country organizations with bandwidth concerns.
2. Capabilities and experience in conducting similar scopes of work as described in this RFP.
3. Description of any partner organization or subcontractor that the Vendor would contract with to do a portion of the scope of work, a budget and a description of the division of level of effort and responsibility between the Vendor and the partner or subcontractor.

## Prior Experience

Please indicate the following:

1. Brief description of the Vendor’s technical work in IT, HR and talent management system design for multi-cultural organizations.
2. Provide the approximate number of corporate talent management systems the Vendor has implemented.
3. Please describe the previous implementations the Vendor has performed for organizations similar to FHI 360.
4. Describe past experience if any, migrating data from Taleo Business Edition to the proposed solution.

## References

Please include three client references, including contact information (individual names, company or organization, phone number/email). References should have worked with the Vendor within the past two years in the areas applicable to this RFP.

## Key Personnel

Please identify key personnel and their roles and responsibilities on this project and a short (half page) bio-sketch of key personnel. Include:

1. Indicate the percentage of the time they will spend on this activity.
2. Show the project organizational structure.
3. Describe how the team will be managed.

# Preparing the Cost Proposal

**40 points total**

1. Please provide a detailed budget for the activities listed in the High Level Requirements that reflects as accurately as possible the real cost of these activities.
2. The budget should be broken down by labor costs (please include the roles of the people who will do the work) and unit costs with an explanation of how each unit cost was reached, including licensing, hosting, travel, overhead or agency fees, indirect and direct costs.
3. Include data migration costs.
4. All Vendor fees must be clearly stated, including the basis on which they will be applied. For example if the Vendor has a set fee (price card) for these activities, please indicate it and include it; also any Vendor or overhead fees if applicable.
5. Budget notes describing how line items budgeted are calculated; documentation must be included.

# Appendix A

## FHI 360 Supplier Information Form

[*Please see separate file labeled Appendix A.*]