

Onboarding Solution
RFP # IT-23-R-007 Attachment A
Scope of Services

1. Overview

The scope of work includes the development, furnishing and installation of an Employee Onboarding Solution. The solution will enable the Town to streamline the management of onboarding employees and to automate its currently paper-driven onboarding process. The system will be primarily driven by the Human Resources Department and will be used to hire all full-time, part-time, and seasonal Town employees.

2. Background

The Town of Westwood is located in Norfolk County, Massachusetts, and is a public entity composed of approximately 25 Departments with approximately 350 full-time, part-time, and seasonal Town employees. Currently, the Town's recruitment process is automated but the onboarding process is not.

3. Project Requirements

Onboarding Solution

It is anticipated that the Onboarding solution will streamline the management of onboarding employees:

- Provide a secure and highly intuitive solution to effectively manage employee onboarding.
- Provide a solution that will automate the current paper-driven onboarding process through the use of online workflows and forms.
- The solution should be a cloud-based solution and it is highly desirable that a browser is used for access without the need for a separate client install.
- The system must permit the creation of Town-specific forms, set parameters for moving them along in the onboarding process, have a professional appearance, be user-friendly, and offer social media and other types of integration with ease.
- The system must be easily customizable and able to be updated by the Town.
- It is highly desirable that the vendor work to integrate the onboarding solution with our existing recruiting system (Clear Company) and our existing payroll system (Harpers Payroll Services, Inc.).

Proposal Requirements

- The vendor is responsible for installation and configuration including (but not limited to) the following:
 - Installation and configuration of any components required for the onboarding solution
 - Installation and configuration of any plug-ins required for system operation.
 - Configuration of all email functionality

- Complete testing of all components
- Configuration of all users, groups, access, functionality and security permissions
- Provide exceptional customer service and assistance with any problems or changes to the system.
- Provide implementation and training services.
- Have a proven track record in producing interfaces between the Onboarding System and payroll systems.

4. Vendor Qualifications.

General Vendor Qualifications:

1. Provide a company profile including its history, length of time in business, number of full time staff, and business locations.
2. Describe your company's experience in the services specified in the RFP. Examples of completed projects, as current as possible should be submitted. Do you want to ask for reference information for each project? If we're interested in the product, we'll want to check references. Having the vendor supply the contact info would save us a lot of time.
3. Provide current reference information for at least three (3) current clients, see Attachment F.
4. Municipal clients are preferred Provide the number of current municipal clients.
5. Describe any awards and special professional recognition your company has received for user experience, usability or related qualities.
6. Provide any additional experiences that would be relevant.
7. Describe the team that would work on this project. Include a list of key team members. Teams with a diverse range of skills and experience will be considered advantageous.

Additional Vendor Qualifications:

8. Provide a complete description of the functionality of the onboarding solution.
9. Provide details on the system's data security at all levels
10. The proposal must clearly identify limitations, shortcomings or weaknesses of the software and suggestions on how this will be overcome.

5. Implementation

Provide a narrative corresponding to each of the Implementation items below:

1. Outline all project phases including a description of tasks performed. Clearly define the responsibilities for the Town of Westwood during each phase of the project.
2. Identify Project team leaders-- names of individual who would be overseeing this project, including a description of experience. Also identify team members who will assist with transition efforts including training.
3. Describe the discovery process including how information is collected.
4. Identify any 3rd party software or service requirement included and/or recommended as part of the proposed solution.
5. Identify all training included in the project cost. If there is a training cost not included in the project phases, it must be specifically identified. Also address any recommended training and associated prices.
6. Describe the training plan. Training will be required for all identified Administrators for the solution as well as end users. Indicate how many representatives will be available for each training session, how many training sessions will be offered and what training materials will be provided to administrators and end users. Describe whether training will be on site or remote and also state whether the training will be hands on or a demonstration.
7. Provide any additional information about your organization that you feel is relevant to the decision-making process.
8. A schedule shall be provided. See Section IX.

6. Technology

Provide a narrative corresponding to each of the Technology items below:

1. Identify specific hardware requirements and/or exceptions for desktop and mobile clients.
2. Describe the backup plan for the proposed system.
3. Describe any interfaces already built to other software
4. Describe the options for testing. Identify any extra costs in terms of setup, installation, configuration, testing, training and licenses related to having access to a test instance.

7. Support, Maintenance and Customer Relationship

Provide a narrative corresponding to each of the Support, Maintenance and Customer Relationship

1. Describe ongoing training opportunities.
2. Describe availability of robust self-service documentation and technical support help
3. Identify support availability and response times (including telephone support) for the following Times:
 - a. Work Day Monday – Friday 7:00 a.m. ET – 5:00 p.m. ET.
 - b. After Hours Emergency support Monday – Friday 5:01 p.m. ET to 6:59 A.m. ET
 - c. Weekend Support Saturday 7:00 a.m. ET – Monday 6:59 a.m. EST
4. Identify any other limitations other than times identified for customer support, including if telephone support is available for limited times or if there are limitations on who can contact support.
5. Describe software updates and site maintenance activities including the number of updates typically provided each year. Identify if there are any system interruptions during the upgrades.
6. The proposal must provide a complete maintenance and support plan for the software including emergency and non-emergency incidents as well as periodic routine schedules. Routine maintenance and associated costs should be included. Routine maintenance shall include, but is not limited to: error or defect correction, updates and telephone assistance
7. Describe the issue escalation processes and policies.
8. How many organizations have implemented your solution overall?
9. How many customers were in each of the last three (3) fiscal years?
10. Describe your customer retention.

8. Schedule

Provide a schedule to accomplish the scope outlined, including items addressed in Implementation.

9. Selection Criteria

Proposals will be reviewed and evaluated to determine if the proposal is responsive to the submission requirements outlined in this RFP. A responsive proposal is one that meets all the requirements of the

RFP, includes all documentation, and is of timely submission. Failure to comply with these requirements may deem a proposal non-responsive.

The Town will evaluate the qualifications, references as well as the pricing to determine the most qualified vendor.

Advantageous proposals will be evaluated based on the bidder's ability to deliver the following:

- The ability to provide and implement an Onboarding Solution that meets the requirements as described in this RFP with minimal customizations
- Vendor's experience with similar customers and similar projects. Municipal experience is important.
- Ability to handle a project of the size and scope of an enterprise-wide Onboarding Solution.
- Overall feedback from customer references on vendor's project implementation, performance, reliability, service level and training plan
- A modern system interface that will be easy to support and flexible to accommodate new technologies and future workflow and process changes with the town
- Quality and completeness of the proposal