

SHELBY COUNTY BOARD OF EDUCATION

PROCUREMENT SERVICES

160 South Hollywood Street, Room 126 □ Memphis, Tennessee 38112-4892 □ Phone (901) 416-5376

(This proposal will not be accepted electronically or by facsimile. All proposals must be mailed or delivered to the above address.)

REQUEST FOR PROPOSAL

(NOT AN ORDER)

Please submit proposals on the item(s) listed below. The right is reserved to reject any or all Proposals. If substitutions are offered, give full particulars. The Proposal must be submitted no later than September 5, 2024 @ 2:00 PM, CST

The Shelby County Board of Education reserves the right to accept or reject any or all proposals, or any part thereof, and to waive any minor informalities and/or technicalities that are deemed to be in the best interest of the Shelby County Board of Education. Successful Vendors shall be paid only when delivery is complete. \*For the appropriate purchases, all material data safety data sheets (MSDA) must accompany all shipments covered under Tennessee Hazardous Chemical Right to Know Law- Tennessee Public Chapter #417- House Bill #731.

REQUEST FOR PROPOSAL
HR TALENT MANAGEMENT SYSTEM

Proposals MUST be received by Shelby County Schools ("MSCS" or "District") by the due date and time set forth above.

During the solicitation process Vendors are not permitted to contact the Board and project Owner regarding the posted solicitation. Failure to adhere to this requirement may subject the respondent to immediate disqualification.

Questions or requests for clarification of technical issues and terms pertaining to this RFP must be submitted in writing via e-mail to taylorm15@scsk12.org, and received by SCBE no later than August 22, 2024 @ 10:00 AM/CST

ISSUED BY: Mary Taylor RFP #090524MT

We propose to furnish the item(s) and/or services outlined in the proposal at prices quoted and guarantee safe delivery E.O.B. delivered and as specified. Proposals are submitted with a declaration that no Shelby County Board of Education Member or employee has a financial or beneficial interest in this transaction.

NAME OF FIRM

PHONE

FAX#

ADDRESS

CITY

STATE

ZIP CODE

E-MAIL ADDRESS

AUTHORIZES REPRESENTATIVE NAME

CHECK HERE IF YOU ARE A MSCS REGISTERED MINORITY VENDOR

CHECK HERE IF YOUR COMPANY QUALIFIES AS A LOCAL VENDOR

PLEASE NOTE: Per the Local Vendor Preference Resolution adopted by the Shelby County Board of Education Commissioners on January 29, 2013, local vendors must have physical address located within the limits of Shelby County. A Post Office Box is not acceptable.

CHECK HERE IF YOU ATTACHED A COPY OF A VALID SHELBY COUNTY BUSINESS LICENSE.

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## **PART I: SCOPE OF WORK**

### **1.0 BACKGROUND**

Shelby County Board of Education (SCBE) is the legal name of the Memphis-Shelby County Schools (MSCS) district. MSCS is Tennessee's largest public school district and is among the 25 largest public-school districts in the United States. MSCS serves approximately 110,500 students in 214 schools. We employ more than 6,000 teachers and 7,900 support personnel to serve our unique student population while offering programming and services to fit the needs of all our students.

Memphis Shelby County Schools has created a data-driven culture that serves as the backdrop for strategic decision-making and informed solution-based decisions. The information gleaned from data, research-based strategies, and performance outcomes provides our district with amazing opportunities to offer high-quality educational options to every student.

The MSCS mission is to prepare all students for success in learning, leadership, and life through three strategic initiatives. The initiatives are:

1. Strengthen Early Literacy (K-2) and Continuing Literacy (3-12)
2. Recruit, Retain, Immerse, and Entrench
3. Relevant, Rigorous, and Equitable Academics

### **2.0 SCOPE OF SERVICES**

SCBE requests proposals for **HR Talent Management System**. The specifications are contained in the Request for Proposal. Responses submitted must meet or exceed all requirements. Proposals that do not meet or exceed all requirements will be considered non-responsive. All exceptions must be noted.

### **3.0 NON-EXCLUSIVE**

The intent of this contract is to provide SCBE with an expedited means of procuring supplies and/or services. This contract is for the convenience of SCBE and is considered to be a "Non-Exclusive" use contract. SCBE does not guarantee any usage. SCBE will not be held to purchase any particular Brand, in any groups, prices or discount ranges, but reserves the right to purchase any item/items listed in the price schedule.

### **4.0 NOTICE OF INTENT TO AWARD**

A Notice of Intent to Award is written notification that a vendor has been selected for a contract award. This letter is not a guarantee of award. The Board of Education reserves the right to reject or accept the recommendation submitted. If the Board accepts and approves the recommendation, an executed agreement will be submitted to the successful supplier. If the Board rejects the recommendation, MSCS shall rescind the Notice of Intent to Award.

## **PART II: GENERAL TERMS AND CONDITIONS**

### **1.0 STATEMENT OF CONFIDENTIALITY**

It is understood and agreed that all information pertinent to this solicitation may contain trade secrets, which are confidential and proprietary. The selected vendor agrees not to disclose or knowingly use any confidential or proprietary information of SCBE and/or third-party participant.

### **2.0 TERM OF AGREEMENT**

The anticipated term of this contract is **one (1) year with the option to renew for four (4) additional one (1) year terms.**

- A. SCBE expects all vendors to provide year-over-year cost reductions recommendations.
- B. Price decreases are acceptable at any time, need not be verifiable, and are required should the vendor/producer/processor/manufacture experience a decrease in costs associated with the execution of the contract.
- C. Price adjustments from the vendor/producer/processor/manufacture for any/all items may be considered at renewal, if applicable noted in the RFP document. The request is subject to approval by the Contracting Officer. The request must be submitted in writing at least ninety (90) days prior to the renewal term and shall be accompanied by supporting documentation.
- D. Should the awarded vendor, at any time during the life of the contract, sell materials of similar quality to another customer, or advertise special discounts or sales, at a price below those quoted within the contract, the lowest discounted prices shall be offered to Shelby County Schools.

### **3.0 PRE-PROPOSAL MEETING (N/A)**

### **4.0 QUESTIONS AND INQUIRIES**

No interpretation of the meaning of the specifications or other documents will be made to any Supplier orally. Questions shall be submitted in writing to the Point of Contact (see Part II, § 5.0). To be given consideration, the questions must be received **NO LATER THAN August 22, 2024 @ 10:00 AM. CST.** Questions that are deemed to be substantive in nature will be responded to in the form of an addendum and posted on SCBE website [www.scsk12.org/procurement/bids](http://www.scsk12.org/procurement/bids) and News Paper. Please do not submit question in PDF format.

## RFP Schedule

<b>RFP Post</b>	<b>August 14, 2024</b>
<b>Questions Due</b>	<b>August 22, 2024 @ 10:00 AM CST</b>
<b>Q&amp;A Post on Website</b>	<b>August 26, 2024 EOD</b>
<b>RFP Due Date/Time</b>	<b>September 5, 2024 @ 2:00 PM CST</b>

Tentatively, vendor virtual presentation will be the week of September 9<sup>th</sup>, 2024.

### 5.0 POINT OF CONTACT

Mary Taylor  
Procurement Office  
[taylorm15@scsk12.org](mailto:taylorm15@scsk12.org)

### 6.0 CONTRACT FACILITATOR /SCBE SUPERVISION

The Vendor's performance will be under the technical direction of the Buyer/Requesting Department/Project Manager who will be responsible for ensuring vendor's compliance with the requirements of this contract to include managing the daily activities of the contract, providing technical guidance to the contract, and overall project scheduling and coordination. The vendor shall be accountable to the end users on all matters relating to the scope of work.

### 7.0 CONTRACT TYPE

The contract resulting from this solicitation will be a price contract based on the scope of work.

### 8.0 PAYMENT TERMS

The Vendor shall submit an invoice detailing the services provided and the actual costs incurred. Payment shall be in accordance with line-item price on the Purchase Order and made within 30 days after the date on the invoice.

SCBE reserves the right to reduce or withhold contract payment in the event the Vendor does not provide the Department with all required deliverables within the timeframe specified in the contract or in the event that the Vendor otherwise materially breaches the terms and conditions of the contract.

### 9.0 RFP REVISIONS

Should it become necessary to revise any part of this RFP, addenda will be posted on SCBE's Procurement Office website @ <http://www.scsk12.org/procurement/bids>. All addenda, amendments or changes issued shall be deemed received by Vendor provided they are posted to SCBE Procurement Office website. Failure of any Vendor to receive or acknowledge receipt of such addenda or interpretation shall not relieve any Vendor from any obligations under this RFP as amended by all addenda. All addenda so issued shall become part of the award.

### 10.0 SUBMISSION DEADLINE

In order to be eligible for consideration, proposals must be received at Procurement Office no later than **September 5, 2024 @ 2:00 pm cst**. Vendors mailing proposals shall allow sufficient carrier delivery time to ensure timely receipt of their proposal Procurement Office after the submission deadline, no matter what the reason, will be returned unopened. Delivery to SCBE' mailroom, lobby, etc. shall not constitute delivery. **The Procurement Office is located at 160**

**S. Hollywood Street, Room 126, Memphis, TN 38112. Proposals responses delivered to any other location shall not constitute delivery to the Procurement Services Office.**

**11.0 PROPOSAL OPENING**

RFP Proposals are not opened publicly, but in the presence of at least two Purchasing Office employees. Once the proposals are opened, the Buyer will prepare a document that summarizes the proposals received. This document will be available for inspection no later than 20 days after opening and prior to Notice of Award letter is issued.

**12.0 DURATION OF OFFER**

A proposal submitted in response to this solicitation is binding upon the Vendor and is considered irrevocable for a minimum of **120 days** following the closing date for receipt of initial proposals or the closing date for receipt of a best and final offer, if applicable.

**13.0 INSURANCE**

All Vendors shall complete and sign the attached Certificate of Insurance with their proposal per the attached insurance requirement form (See Appendix G).

**14.0 LIQUIDATED DAMAGES**

In the event the Award Bidder(s) fails to deliver the goods or services of the contract in accordance with the specifications, SCBE reserve the right to purchase the goods/services on the open market in sufficient quantities to assure the continued operation of SCBE. All additional expenses incurred by SCBE as a result of such purchases will be deducted from the moneys owed or moneys which may become due.

**15.0 CRIMINAL BACKGROUND CHECK/PHOTO IDENTIFICATION BADGE**

In accordance with TN Code Ann. 49-5-413, unless explicitly excluded by statute; and pursuant to Shelby County Schools' requirements, Vendors (persons, corporations or other entities) whose employee(s), subvendor(s), or representative(s) will come in contact or close proximity to MSCS students during the course of business, must require their employee(s), subvendor(s), or representative(s) to supply a fingerprint sample and submit to a criminal history check through the Tennessee Bureau of Investigation (TBI), and they will issue them a greenlight letter. Once they receive the greenlight letter, an appointment should be made with Shelby County Schools ID Department. A copy of the greenlight letter, along with \$30.00 (exact change or company check), will be required to obtain an MSCS Vendor ID Badge. A MSCS Vendor ID Badge is required before permitting the person to have contact with the children or entering school grounds.

The cost of fingerprinting, conducting the criminal records check, and obtaining a Shelby County School's identification badge will be the sole responsibility of the Vendor for each of the Vendor's employee(s), subvendor(s), or representative(s). Vendors doing business with MSCS are required to renew their badges annually. The Shelby County School's identification badge shall be worn at all times by each of the Vendor's employee(s), subvendor(s), or representative(s) at shirt pocket height while on Shelby County Schools' property. For more information regarding fingerprinting, conducting the criminal records check, and obtaining a Shelby County School's identification badge, please contact 901-416-5318.

MSCS further reserves the right to audit the criminal history background records of any Vendor employee(s), subvendor(s) or representative(s) having contact with MSCS students. Audits may be conducted on a quarterly basis with 48 hours' prior notice. It is the Vendors responsibility to ensure records are current and made available upon request to MSCS. Failure

to provide MSCS access to current criminal history checks upon request could lead to Vendor debarment.

**16.0 COMPLIANCE WITH LAWS**

Vendors shall comply with all federal, state, and local laws, statutes, ordinances, rules, and regulations applicable to the services to be rendered under this Contract. Vendors violation of any of these laws, statutes, ordinances, rules, or regulations constitutes a breach of this Contract and entitles SCBE to terminate this Contract immediately upon delivery of written notice of termination to Vendor.

**17.0 LEGAL COMPLIANCE**

- A. Vendor shall comply in all respect with Federal, State and Local Regulations, including laws regarding eligibility to work in the United States. The provisions of this Contract shall be governed by the laws of Tennessee. Any disputes, legal cases or other controversies shall be pursued in Tennessee Courts consistent with and subject to Tennessee State Law. Additionally, if applicable, all materials, supplies, equipment, or services supplied, as a result of this Contract shall comply with the applicable U.S. and Tennessee Occupational Safety and Health Act Standards.
- B. Specifically, vendor shall comply with all applicable laws and regulations relating to the employment of aliens, such failure, shall constitute a material breach of contract. It is a mandatory requirement of this contract that employees of vendor and vendor's subcontractors are screened through the Federal Government's E-Verify system, found at [www.dhs.gov/E-Verify](http://www.dhs.gov/E-Verify) . This is a "no fee" service.

**17.1 EPA COMPLIANCE**

Materials, supplies, equipment, or services shall comply in all respects with the Federal Noise Control Act of 1972, where applicable.

**18.0 BONDING (N/A)**

**19.0 TERMS AND CONDITIONS**

Any contract entered into in connection with this solicitation shall be subject to these General Terms and Conditions except as otherwise modified herein.

It shall be the Vendor's sole responsibility to insure they are compliant with all applicable federal, state, and city laws, rules, ordinances, statutes, etc., that may impact this contract. SCBE shall bear no responsibility for monitoring the Vendor's compliance with said legal requirements. If the Vendor fails to maintain legal compliance, SCBE may find said Vendor in default.

In the event of conflict between the General Terms and Conditions and any part or portion of the Special Conditions (Appendix A), these General Conditions shall take precedence.

In the event of conflict between this solicitation any of the General Terms and Conditions proposed by any Vendor or incorporated in any acknowledgement of contract awarded to the successful Vendor, then, and in such event, the terms and conditions stated herein shall take precedence unless modified in writing by the Procurement Director.

**20. SMALL, MINORITY AND WOMEN-OWNED BUSINESS ENTERPRISES (2 CFR 200.321)**

The Shelby County Board of Education (hereafter referred to as the “Board”) recognizes that small businesses and businesses owned by minorities and/or women (hereafter referred to as SBEs/MWBEs) frequently face unique problems that are not encountered by large majority-owned businesses. Therefore, it is the policy of the Board to take necessary affirmative steps, in accordance with 2 CFR 200.321, to assure that equal opportunities are provided for MWBEs to participate in the performance of District contracts financed in whole or in part with federal funds.

**2 CFR § 200.321 - Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.**

Title 2: Grants and Agreements

**PART 200—UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS**

200.321 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

(a) The non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

(b) Affirmative steps must include:

(1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

(2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

(3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

(4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;

(5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and

(6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

**Certified SBE/MWBE Vendor Directory**

Please use this link <http://www.scsk12.org/mwbe/index> to access Memphis-Shelby County Schools' certified SBE/MWBE vendors list.



## PART III: PROPOSAL FORMAT

### 1.0 GENERAL FORMAT

A. Vendors shall submit the following: Each submission should include as indicated below.

The proposal shall include **One (1) original (labeled), ten (10) copies, and 1 (one) USB** in a sealed envelope clearly labeled as indicated in B below. An electronic version of the proposal shall also be submitted with the original. The electronic media must be a USB and shall bear a label on the outside containing the RFP number and name, as well as the name of the Vendor.

B. The outside of each package shall, in addition, be labeled with the following:

1. The Vendor's name and business address.
2. The due date/time for receipt of proposals.
3. The Title of the RFP and RFP number

### 2.0 PROPOSAL FORMAT

The proposal must include a table of contents and all pages in the proposal must be numbered, consecutively from beginning to end and separated by tabs as described below:

#### TAB A. TRANSMITTAL LETTER

The proposal is to be accompanied by a brief transmittal letter prepared on the Vendor's letterhead and signed by an individual who is authorized to commit the Vendor to the services and requirements in the RFP and proposal. This transmittal letter shall include:

1. The name, title, address, telephone number, and electronic mail address of the person authorized to bind the Vendor to the contract, who will receive all official notices concerning this RFP.
2. The Vendor's Federal Tax Identification Number or Social Security Number.
3. A brief statement of the Vendor understands of the work to be done, the commitment to perform the work within the time period, and a statement of why the firm believes it is best qualified to perform the engagement.
4. A statement that the proposal is a firm and irrevocable offer for a period of one hundred twenty (120) days.
5. Acknowledgement of all Addenda to this RFP

#### TAB B. TABLE OF CONTENTS

#### TAB C. EXPERIENCE AND CAPABILITIES

Vendor shall provide information on past and current experience with rendering services similar in size and scope to those in this RFP. This description shall include:

1. Summary of the services offered including the number of years the Vendor provided these services; the number of clients and geographic locations the Vendor currently serves, etc. and has served; and if a past customer, why the Vendor is no longer providing services;
2. Organizational chart of the Vendor showing the major components of the unit(s) that will be performing the requirements of this contract; where the management of this contract will fall within the organization; and what resources will be available to support this contract in primary, secondary and back-up roles
3. Name all key personnel who will perform work under this contract and include each individual's resume. Include work history, educational background and indicate the proposed role/function of each individual.
4. At least **three (3)** recent references from its customers who are capable of documenting the following: a) the Vendor's ability to manage similar contracts, b) the quality and breadth of services provided by the Vendor under similar contracts (See Appendix C). If Shelby County Schools is a client or has been a client of the Respondent for the services outlined in the RFP, MSCS reserves the right to be a reference, if not listed.

**TAB D. FISCAL INTEGRITY/FINANCIAL STATEMENTS**

1. The Vendor shall include in its proposal completed audited financial statements including the auditor's notes, for its **last three years**. If the Vendor has not had its financial statements audited by an independent accounting firm, the Vendor must submit such un-audited financial statements as it has. Some acceptable methods include but are not limited to one or more of the following:
  - a. Recently audited (or best available) financial statements
  - b. Dunn and Bradstreet Rating
  - c. Standard and Poor's Rating
  - d. Lines of credit
  - e. Evidence of a successful financial track record
  - f. Evidence of adequate working capital
2. Vendor shall identify any claims during the past five (5) years and provide information on any pending litigation, lawsuits etc. The failure to provide accurate information may be determined to be a material breach of any future agreement or contract with SCBE.

**TAB E. TECHNICAL RESPONSE TO RFP SCOPE OF WORK**

The Vendor shall address each major requirement of Part V (Scope of Work) (separated by tabs if substantial)

**TAB F. FORMS**

1. Bid Bond (If Applicable)
2. Special Terms & Conditions for RFP'S (Appendix A)
3. Addenda Acknowledgement Form (Appendix B)
4. References (Appendix C)
5. Completed Non-Collusion Certificate (Notarized) (Appendix D)
6. Completed Debarment Affidavit (Notarized) (Appendix E)
7. Completed Anti-Bribery Affidavit (Notarized) (Appendix F)
8. Certificate of Insurance Coverage (Appendix G)
9. 2011 Local Preference Purchasing (Appendix H)
10. Compensation/Pricing Schedule (Appendix I)
11. State of Tennessee Iran Divestment Act Certification, Certification Regarding Lobbying, And State of Tennessee Non-Boycott of Israel Certification (Appendix J)

**TAB G. Pricing /Compensation Schedule**

**TAB H. ELECTRONIC MEDIA (INCLUDE WITH SUBMISSION)**

**Failure to provide any of the requested information or documents in this solicitation may render the bid non-responsive.**

## **PART IV: EVALUATION AND SELECTION PROCEDURE**

### **1.0 EVALUATION COMMITTEE**

Evaluation of the proposals will be performed by a committee established for that purpose and will be based on the criteria set forth below. The contract resulting from this RFP will be awarded to the Vendor whose proposal is the most advantageous to SCBE, considering technical factors and other factors set forth herein.

### **2.0 EVALUATION PROCESS**

- A. The committee will evaluate each proposal using the evaluation criteria set forth below. As part of this evaluation, the Committee may hold discussions with all qualified Vendors. Discussions may be conducted via teleconference or may take the form of questions to be answered by the Vendors and conducted by mail, E-mail, or facsimile transmission at the discretion of SCBE. During the evaluation process, the committee may request technical assistance from any source.
- C. The Evaluation Committee may reject in whole or in part any and all proposals, waive minor irregularities, and conduct discussions with all responsible Vendors in any manner deemed necessary to serve the best interests of SCBE.
- D. If applicable, SCBE Policy 2011 Local Preference Purchasing will be applied accordingly. Please see **Appendix H** for policy details.
- E. Vendors may be asked to make an oral presentation to the Evaluation Committee. The purpose of the oral presentation is to provide an opportunity for the Vendor to clarify its proposal submission and substantiate proposal representation. If an oral presentation is requested, the oral presentation is a part of the evaluation.
- F. If it is determined to be in the best interest of SCBE, SCBE may invite Vendors to make final revisions to their technical and/or financial proposals through submission of a Best and Final Offer.
- G. The Committee will recommend the vendor whose overall proposal provides the most advantageous offer to SCBE considering all RFP requirements, based on evaluation factors set forth in this RFP.

### **3.0 EVALUATION CRITERIA**

The Evaluation committee will evaluate proposals using the following criteria below. The committee shall determine which proposals have the basic requirements of the RFP and shall have the authority to determine whether any deviation from the requirements of the RFP is substantial in nature. The committee may reject in whole or in part any and all proposals and waive minor irregularities.

- A. Approach to satisfying requirements
- B. Vendor's experience and capabilities/references
- C. Fiscal Integrity/Financial Stability

<b>Evaluation Criteria</b>	<b>Major</b>
	<b>Weights</b>
Qualification/Experience	5%
Functionality/ Services	50%
Technology Requirements	10%
Services and Support Requirements	15%
Financial Stability	5%
References	5%
Cost	10%
<b>Total</b>	<b>100%</b>

## PART V: SCOPE OF SERVICES (DETAILS)

### 1.0 THE SERVICES

1.1 The Services SCBE hereby solicits submissions of written proposals, from qualified respondents to provide for SCBE the services described herein, all in accordance with the terms and conditions detailed herein. In particular, the services sought by SCBE will require the Respondent to provide:

#### A. General Requirements

MSCS is looking for user-friendly, web-based Talent Management System solution that can be easily managed year to year with available staff. We are requesting an established application from customers of the size and complexity of Memphis Shelby County Schools. MSCS will not consider any software in the Alpha/Beta stage of development. The service and expertise required for this project include but are not limited to installation, configuration, customization, training, deployment, consulting, and integration with HR software, ongoing maintenance, and support.

The Talent Management System will support the core processes of attracting, developing, and retaining talent in an organization. It will allow alignment with the organization's strategy, culture, and goals, and provide a positive employee experience.

The overall goal of the Talent Management System (TMS) is to create a 1 stop shop that provides MSCS employees access to learning opportunities, performance management in addition to providing the organization access to social media platforms to recruit candidates, link candidate applications with district-wide vacancies, and ensures the District can hire high-quality candidates in an efficient manner. The TMS solution software will serve all locations and all employee types within the district, including all schools and Central Office, all with their own defined responsibilities and access. The system should support individualized learning plans, evaluation plans, recruitment & onboarding plan. The system would need to be supported by employee information and respond in real-time to district-level and school-level changes to the district's employee tracking system (APECS). By doing so the district will be able to recruit, hire, and manage the applicant experience with in-house support.

#### B. Requirements for Applicant Tracking System Solution

The system/contractor **MUST** meet the minimum requirements identified below. Please check **YES** if your proposal meets the identified requirement and **NO** if it does not.

Category	Requirement Name	Requirements Description	Yes	No
AI-based Capabilities	AI-based Chatbot	The solution leverages AI-based chatbots to understand and respond to user inputs. It also adapts and improves the performance based on experience.		

AI-based Capabilities	AI-based Job Descriptions Generator	The solution leverages artificial intelligence (AI) for an AI-based job description generator to assist in creating job descriptions by automating and streamlining the process of drafting clear, accurate, and compelling job postings.		
AI-based Capabilities	AI-based Learning Recommendation	The solution leverages AI-based learning recommendations to suggest personalized learning content or courses to individuals based on their preferences, behavior, and learning history.		
AI-based Capabilities	AI-based Personalized Interview Questions	The solution leverages AI to generate a set of interview questions that are specific to the candidate's background and the requirements of the position.		
AI-based Capabilities	AI-based QA Discussion	The solution leverages an AI-based QA discussion tool to connect potential candidates to employees.		
AI-based Capabilities	AI-based Resume Screening	The solution leverages AI-based candidate screening or recruitment tools to screen and shortlist candidates from the resumes.		
AI-based Capabilities	AI-based SEO based Website	The solution leverages machine learning algorithms by optimizing search engines for website management.		
AI-based Capabilities	AI-based Talent Matching	The solution leverages an AI-based talent matching tool to suggest the best candidates for a job based on previous experience, skill set, work experience, location, etc.		
AI-based Capabilities	Natural Language Processing	The solution leverages AI for natural language processing (NLP) to enable the solution to understand, interpret, and generate human language from the survey responses in a meaningful and contextually relevant way.		
Dashboard and Reporting	Bookmark Report	The solution allows saving reports as bookmarks or favorites to be accessed repeatedly.		
Dashboard and	Custom Reports	The solution allows creating custom		

Reporting		reports by applying filters, pulling data from multiple areas, etc. It also allows generating reports from scratch. Reports must be able to cross all areas of the platform without coding required.		
Dashboard and Reporting	Dashboard	The solution offers a customizable dashboard with several standard views, combining performance metrics and KPIs with drill-down capabilities on every view.		
Dashboard and Reporting	Learning Summary	The solution allows generating reports on learning data, such as data related to courses, classes, and certifications.		
Dashboard and Reporting	Performance Report	The solution allows generating reports on performance data, such as reports related to appraisals and goals to manage employees.		
Dashboard and Reporting	Pre-built Reports	The solution offers pre-built reports or canned reports to provide insights into talent data and deliver information.		
Dashboard and Reporting	Real-time Reports	The solution allows generating reports in real-time to access and analyze data as it is generated, providing the most current insights.		
Dashboard and Reporting	Recruitment Dashboard	The solution allows generating reports on the recruitment process, such as creating job posts, searching, and selecting candidates, processing job offers, and initiating the onboarding process of successful candidates.		
Dashboard and Reporting	Schedule Reports	The solution allows scheduling reports that can be delivered at a pre-set time.		
Dashboard and Reporting	Succession Report	The solution allows generating a report to view a list of succession plans without designated successors, selected succession plans, and the chosen course(s) completion date.		
Dashboard and Reporting	Visualizations	The solution allows generating interactive charts customized to visualize large quantities of data graphically. It can offer multiple visualizations charts such as bar, line,		



		funnel, table, column, donut, pie chart, area maps, heat maps, etc.		
Employee Communication	Chat Communication	The solution offers a browser-based chat application that allows real-time communication between users, enabling them to share text messages, images, videos, links, etc.		
Employee Communication	Email Communication	The solution allows creating and sending emails between the candidates or employees and employers.		
Employee Communication	Employee Milestone	The solution allows tracking an employee's personal or professional milestones, such as work anniversaries, referrals, birthdays, long service, etc.		
Employee Communication	Survey Builder	The solution allows creating employee engagement surveys to collect employee feedback and gauge employee satisfaction based on their responses.		
Employee Communication	Text Communication	The solution allows creating and sending text messages between candidates or employees and employers.		
Integrations and Extensibility	API Access	The solution provides APIs to fetch, create, update, or delete information and create custom integrations with third-party applications.		
Integrations and Extensibility	BI Software Integration	The solution offers integration with popular BI software, such Tableau, Power BI, etc.		
Integrations and Extensibility	Compensation Management Software Integration	The solution offers integration with popular compensation management software, such as CompAccelerator, CompensationXL, etc.		
Integrations and Extensibility	Data Export	The solution allows exporting employee data in CSV, Excel, and PDF file format.		
Integrations and Extensibility	Data Import	The solution allows importing employee data in CSV or Excel file format.		

Integrations and Extensibility	Enterprise Collaboration Software Integration	The solution offers integration with popular enterprise collaboration software, such as Slack, Microsoft Teams, etc.		
Integrations and Extensibility	eSignature Software Integration	The solution offers integration with popular eSignature software, such as DocuSign, HelloSign, etc.		
Integrations and Extensibility	HR Management Software Integration	The solution offers integration with popular HR management software integration, such as BambooHR, ADP, Workday, etc.		
Integrations and Extensibility	iPaaS or Middleware Software Integration	The solution offers integration with iPaaS or middleware software, such as Zapier, Tray.io, Workato, automate.io, etc.		
Integrations and Extensibility	Job Board Platform Integration	The solution offers integration with popular job board platform, such as Indeed, LinkedIn, etc.		
Integrations and Extensibility	Learning Management Software Integration	The solution offers integration with popular learning management software, such as Absorb LMS, Tovuti, etc.		
Integrations and Extensibility	Video Conferencing Software Integration	The solution offers integration with popular video conferencing software, such as WebEx, Zoom, etc.		
Learning Management	Assessments	The solution allows assessing learners' performance with tests, quizzes, and assignments and evaluating them with grades or scores. State and federally mandated trainings shall be a part of this module (i.e. OSHA, Sexual Harassment, DCS Reporting, etc.).		
Learning Management	Assign Courses	The solution allows assigning courses to learners or vice versa.		
Learning Management	Course Catalog	The solution offers a centralized repository or a catalog of all the courses available to add, store, update, and track all content, training materials, employee handbooks, or technical documentation.		

Learning Management	Custom Certificates	The solution allows creating or customizing prebuilt certificates with background images, logos, and text awarded to learners on course completion.		
Learning Management	Learning Paths	The solution allows creating learning paths by organizing courses that enable learners to take them sequentially.		
Learning Management	Learning Preference	The solution offers various learning delivery models, such as synchronous, asynchronous, blended, etc., for the learners or employees.		
Learning Management	Learning Progress Tracking	The solution enables monitoring learners' progress on the assigned courses through a dashboard or a progress report.		
Mobile Capabilities	Compensation Management	The solution allows managing or accessing compensation of employees through mobile devices.		
Mobile Capabilities	Learning Management	The solution allows managing learning of the employees through mobile devices.		
Mobile Capabilities	Manage Onboarding	The solution allows managing onboarding process through mobile devices.		
Mobile Capabilities	Mobile Collaboration	The solution allows sending and receiving one-to-one messages to candidates using mobile devices.		
Mobile Capabilities	Native Android and iOS Applications	The solution offers native iOS and Android mobile applications.		
Mobile Capabilities	Performance Management	The solution allows managing performance related activities, such as setting goals, collecting feedback, accessing reviews, etc., through mobile devices.		
Mobile Capabilities	Push Notifications	The solution allows sending push notifications through mobile application.		
Mobile Capabilities	Recruitment Process	The solution allows managing the recruiting process through mobile		

		devices.		
Mobile Capabilities	Responsive Design	The solution provides users with a consistent experience on any device with a fully responsive web-based platform.		
Onboarding	Digital Signature	The solution provides e-signing capabilities that allow digitally signing documents during the onboarding process.		
Onboarding	Employee Handbook	The solution offers employee manual or handbook, as a document that outlines the policies, procedures, expectations, and guidelines of an organization.		
Onboarding	New Hire Onboarding Portal	<p>The solution provides a portal for new hires to complete tasks, documentation, etc., and deliver a personalized experience. Pre-employment verification (verify candidate's company name, dates of hire, and titles).</p> <p>Proof of Employment Verification (Current employees, Former Employees, Social Service Agency verification)</p> <p>Employee Resignation</p> <p>Create 60–90-day Onboarding Plans</p> <p>Offboarding Process</p>		
Onboarding	Onboarding Forms	The solution allows creating and delivering electronic onboarding forms, including compliance forms, W4, I9, (I9 should integrate with E-Verify), Direct Deposit, Confidentiality Agreement, Benefits Enrollment, etc.		
Onboarding	Onboarding Tasks	The solution allows creating onboarding tasks or checklists to be completed by new hires.		
Onboarding	New Hire Orientation	The solution allows for scheduling and management of new hire orientation and training		
Onboarding	Onboarding Tasks	The solution offers reminders for the onboarding process in an employee's		

	Reminder	journey for activities, such as paperwork completion, orientation, training, etc.		
Performance Management	1-on-1s	The solution allows setting up a 1-on-1 review with the employee.		
Performance Management	360-degree Performance Review	The solution allows collecting and viewing performance feedback from peers, subordinates, managers, etc.		
Performance Management	Anonymous Reviews	The solution offers the ability for employees to provide reviews anonymously.		
Performance Management	Create Action Plans	The solution allows creating action items based on the discussion during each 1-on-1 meeting.		
Performance Management	Employee Recognition	The solution allows recognizing employees for their performance and achievements with rewards.		
Performance Management	Goal Assignment	The solution allows assigning goals to users as individual, team, or organizational goals.		
Performance Management	Goal Creation	The solution allows creating individual and team-level goals with objectives and allows tracking key results.		
Performance Management	Goal Tracking	The solution allows viewing and tracking the progress of the goal.		
Performance Management	Leaderboard	The solution offers a leaderboard that displays rankings for the level of engagement and performance of employees.		
Performance Management	Performance Scoring	The solution allows evaluating employee performance with scores or rates.		
Performance Management	Real-time Feedback	The solution allows sending ongoing performance feedback to employees in real-time.		
Performance Management	Review Frequency	The solution allows setting a frequency for performance reviews.		
Performance Management	Team-based Performance Tracking	The solution allows tracking the feedback of the team's performance.		
Platform	Audit Trail	The solution allows maintaining a record		

Capabilities		of administrative and user actions and generates a report on such activities.		
Platform Capabilities	Bulk Actions	The solution allows performing bulk actions to edit multiple active candidates at the same time.		
Platform Capabilities	Calendar View	The solution offers a calendar that displays upcoming events, interview schedules, reminders, training schedules, etc.		
Platform Capabilities	CCPA Compliance	The solution is California Consumer Privacy Act (CCPA) compliant.		
Platform Capabilities	Custom Fields	The solution allows creating custom fields to capture custom data as per the organization's requirements.		
Platform Capabilities	Document Repository	The solution allows uploading and storing documents in a centralized place.		
Platform Capabilities	EEOC and OFCCP Compliance	The solution complies with the Equal Employment Opportunity Commission (EEOC) and Office of Federal Contract Compliance Programs (OFCCP) regulations.		
Platform Capabilities	GDPR Compliance	The solution is General Data Protection Regulation (GDPR) compliant.		
Platform Capabilities	Multi-language Support	The solution supports multiple languages. It allows changing the language of the user interface in the application or generating reports in preferred languages for specific locations.		
Platform Capabilities	Role-based Permissions	The solution allows defining privileges by assigning user roles to control access to records with different levels of data editing and sharing.		
Platform Capabilities	SCORM Compliance	The solution complies with the Shareable Content Object Reference Model (SCORM) regulations.		
Platform Capabilities	Single Sign-on	The solution allows configuring single sign-on (SSO) to provide automatic access to the users without prompting them to sign-in separately if they have		

		already authenticated themselves into the corporate identity management system, such as LDAP and Active Directory, SAML2, Okta, Onelogin, OpenID Connect, AZURE, etc.		
Platform Capabilities	Talent Profile	The solution allows creating an employee talent profile that provides employee details, such as positions, locations, qualifications, roles, contact information, skills, competencies, etc.		
Platform Capabilities	Two-factor Authorization (2FA)	The solution allows configuring two-factor authentication (2FA) for all the users or a group of users using various methods like security questions, one-time passcodes, security tokens, etc.		
Platform Capabilities	Workflow Automation	The solution allows configuring workflows to trigger actions for the scenarios, such as hiring process, performance, surveys, etc.		
Succession Planning	Exit Interviews	The solution allows for documenting and tracking of employee exit interviews by MSCS staff.		
Platform Capabilities	Candidate Experience	Provide a single portal for candidates to manage their career development, skills, learning transcript, performance evaluation, job submissions, share job openings, and stay in the know for future opportunities.		
Recruitment and Applicant Tracking	Background Screening	The solution allows performing background screening and viewing the results, including any drug activities or criminal background history, directly from the system to generate compliance reports.		
Recruitment and Applicant Tracking	Candidate portal	The solution allows candidates to create their profiles, manually search and apply to jobs, and view their application status.		
Recruitment and Applicant Tracking	Candidate Scoring	The solution allows scoring candidates, enabling recruiters to evaluate candidates' performance in the hiring process.		
Recruitment	Candidate Search	The solution allows searching for		

and Applicant Tracking		applicants linked to a specific requisition using filters based on skills or jobs.		
Recruitment and Applicant Tracking	Career Site	The solution allows customizing career sites by adding a company logo, background images, social channels, etc.		
Recruitment and Applicant Tracking	Custom Offer Letter	The solution allows generating offer letters using customizable templates or building them from scratch.		
Recruitment and Applicant Tracking	Employee Referrals	The solution enables employees to submit referrals for specific jobs and monitor the progress of each referral through the hiring process.		
Recruitment and Applicant Tracking	Interview Schedule	The solution allows scheduling and rescheduling candidate interviews.		
Recruitment and Applicant Tracking	Secondary Jobs	The solution allows for current employees to have a primary job and secondary job(s) listed		
Recruitment and Applicant Tracking	Offer Management	The solution will allow staff to review and manage all details pertaining to compensation assigned to job offers.		
Recruitment and Applicant Tracking	Position Control Management	The solution allows for alignment with current position control management systems		
Recruitment and Applicant Tracking	Interview Self-scheduling	The solution allows candidates to self-schedule interviews or select an available slot according to the availability of interviewers or panelists.		
Recruitment and Applicant Tracking	Video Interview	The solution allows candidates to respond to pre-selected questions via video recording		
Recruitment and Applicant Tracking	Job Alerts	The solution allows sending alerts to candidates of new job openings that match their job preferences based on the set frequency.		
Recruitment and Applicant Tracking	Job Campaign	The solution allows creating, scheduling, and sending job-related campaigns to candidates through email marketing, SMS, social media, advertising, etc.		



Recruitment and Applicant Tracking	Job Description Library	The solution allows hiring managers and recruiters to access job information on job profiles or descriptions library when creating new positions.		
Recruitment and Applicant Tracking	Job Posting	The solution allows posting jobs to internal career websites and external job boards.		
Recruitment and Applicant Tracking	Pre-screening Questionnaires	The solution allows creating a series of questions for candidates about their work experience, job preferences, skills, and more to determine if they meet the open position criteria. It also qualifies or disqualifies candidates for the next stage, depending on their answers to a questionnaire. (Pre-Screening Questionnaires) add transcript submission		
Recruitment and Applicant Tracking	Contract Creation	The solution allows creating digital contracts or agreement forms that can be distributed in bulk or individually.		
Recruitment and Applicant Tracking	Recruitment Pipeline	The solution allows creating and managing recruitment pipelines that define stages based on the preferred hiring process.		
Recruitment and Applicant Tracking	Requisition Approval	The solution allows approval or rejection of a job requisition by an authorized person or automates the process based on predefined criteria.		
Recruitment and Applicant Tracking	Resume Parsing	The solution automatically extracts, analyzes, stores, and organizes all relevant information and applications from candidates' resumes, such as specific job skills, work experience, contact information, etc., based on a recruiter's needs.		
Recruitment and Applicant Tracking	Job Fair Management tools	The solution must allow for managing of job fairs, college fairs etc...		
Recruitment and Applicant Tracking	Talent Pools	The solution allows managing external and internal applicant talent pools based on identified skills and roles.		
Recruitment	References	The solution allows the applicant to		

and Applicant Tracking		submit references, and a reply/response will be system generated.		
Succession Planning	Bench Strength or Employee Readiness	The solution offers a bench strength for each role to understand the depth of the talent pipeline, including the readiness of each potential successor.		
Succession Planning	Career Paths	The solution allows creating a sequence or series of job positions leading to short-term and long-term professional goals.		
Succession Planning	N-box Grid View	The solution provides an N-box grid or a talent matrix, a talent management tool organizations use to assess their employees' performance versus growth potential.		
Succession Planning	Organizational Chart	The solution provides organizational charts to view the company structure, hierarchy, employee rankings, and complete employee information.		
Succession Planning	Skill-gap Identification	The solution allows performing a skill gap analysis to determine areas where employees need improvement.		
Succession Planning	Skills Tracking	The solution allows tracking employee skills, competencies, and accomplishments.		

**C. Technical and System Capabilities:**

Proposal response **MUST** address each section outlined below. Response must be clearly labeled with the corresponding RFP section name and number.

1. Describe how the TMS will increase the efficiency of the application process and validity of the data collected from applicants.
2. Describe how the TMS will increase the efficiency of the onboarding process for new hire employees.
3. Describe the tools and methods available for screening multiple applicants and application types.
4. Describe the different ways applicants can be categorized.
5. Describe any automated pre-screening capabilities of the system.
6. Describe how the electronic referencing system works.
7. Provide a detailed description of the system's reporting system (capabilities, formats, dashboards, data points)
8. Describe the ad hoc querying capabilities of the system.
9. Describe any communication and/or scheduling tools available in the TMS.

10. Describe the system's third-party integration capabilities (i.e. social media, job boards, the District's compensation software and job description database, APECS, District data warehouse).
11. Describe the system's data integrity capabilities.
12. Describe the system's vacancy tracking/routing/approval capabilities.
13. Describe the system's customized form creation and routing capabilities.
14. Describe the system's job description capabilities.
15. Describe the onboarding capabilities of the TMS.
16. Describe how applicants and job postings are identified.
17. Describe any available job fair management tools.
18. Describe the applicant registration and account self-management tools.
19. Describe the application process for internal and external applicants.
20. Describe the system's notification capabilities throughout the application process.
21. Describe the interface and tools available to hiring managers.
22. Describe the system's security capabilities/features and role management tools.
23. Describe the system's training library.
24. Describe form customization capabilities.
25. Describe applicant screening customization capabilities.
26. Describe the on-site and online trainings provided by the supplier for HR users and hiring managers.

**D. Technology Requirements:**

Respondent's proposed solution **MUST** meet the minimum technology requirements identified below. Please check **Yes** if your proposal meets the identified requirement and **No** if it does not.

<b>System Minimum Technology Requirements</b>	<b>Yes</b>	<b>No</b>
The District requires that the proposed system is compatible with multiple browsers. The system must be compatible with, but not limited to: Explorer (version 9.0 and higher), Safari, Firefox, and Chrome.		
The District requires that all data collected, analyzed and/or disseminated by the TMS, remain the sole property of and for the exclusive use of, the District.		
The District requires availability to systems throughout the year every day, 24 hours / day, except during scheduled maintenance periods.		
Report availability shall be 24 hours/day, except during scheduled maintenance periods.		
The system must provide for HTTPS support in all functions where usernames and/or passwords are transmitted.		
Provides multiple printing options such as printing to local or network printers, printing to a screen/monitor, and printing to a disk		

file.		
The ability to provide audit function to include tracking of user actions.		
Must have the capabilities of migrating data from existing TMS.		
The Supplier shall provide the District with a test site and log-in information with RFP submittal to allow for independent testing for compatibility.		
Provide for at least 600 and up to 1,000 concurrent users within the system.		
Contractor supported application customization.		
Solution testing is performed by Contractor.		
Provide enhancements/releases/upgrades on a regular basis.		
Updates are installed for testing without disturbing production activities.		
Provide documentation detailing which functionality is affected and how after updates/upgrades.		
The system will convert to use the most current active version of the solution as new versions are introduced in a timely and judicious manner.		
Can fully access all applications via standard Windows operating system.		
System testing is performed by Contractor; Comprehensive testing performed by Contractor and SCS to include disaster recovery procedures		
The database system has gateway to pass and receive data from other major database systems.		
Identify the speed of access to online applications.		
A system crash will not cause a corrupted database.		
An abnormal user exit from a program will not cause a corrupted database.		
Users can select download format based on user specifications (Excel, text, etc.).		
System supports automatic backup/archiving to: Tape, removable disk, fixed disk, etc.		

Backup processing can occur during normal system use without system downtime.		
System is available to all users during system backups.		
System is available during nightly processing.		
Full system backups take less than 3 hours.		
System can utilize active directory for user information		
System can utilize application specific usernames and passwords.		
System restricts access attempts during the same session.		
System provides database level security.		
System provides application-level security.		
System provides department level security.		
Application specific password requirements can be configurable.		
Password can be user defined.		
Password can be automatically retrieved by user.		
The software shall provide features that would detect and block access to unauthorized users.		

**E. Implementation/Design**

Respondent's proposed solution **MUST** meet the system implementation and design requirements identified below. Please check **YES** if your proposal meets the identified requirement and **NO** if it does not. Also provide information detailing how the proposed solution will meet and or exceed the requirements.

<b>System Implementation and Design</b>	<b>Yes</b>	<b>No</b>
The contractor shall provide a dedicated Project Manager with the necessary expertise to oversee and perform the tasks required to ensure the successful and timely implementation of the system.		
The Contractor's Project Manager will provide reports to the MSCS Project Manager and will collaborate with the MSCS Project Manager to develop one comprehensive Project Work Plan.		
The contractor shall submit a detailed Project Work Plan that sets forth the various project phases with definitive starting and completion dates to be approved by MSCS. This Project Work Plan shall include but not be limited to the following deliverable: Specifications of all software modifications, software installation, data conversion, testing, delivery of documentation, training schedules, system acceptance.		

The Contractor's Project Manager shall submit an updated Project Work Plan to the MSCS Project Manager at regular intervals and as project events may require.		
Upon Project commencement, the Contractor's Project Manager shall provide weekly written status report to the MSCS Project Manager. This report shall document the Project's status, identify tasks not on schedule, report problems and specify how and when problems will be resolved.		
Contractor shall provide a mutually agreed upon Design Plan along with the Methodology and Implementation Plan that fits the standards and environment of MSCS.		
No adjustment shall be made to the Design Plan without the approval of the MSCS Project Manager or his/her designee.		
Respondent will provide detailed project action plan and timeline schedule for implementation of proposed system.		

**F. Conversion**

- MSCS will provide data in a delimited file format for import into the Applicant Tracking system.
- The successful Contractor shall provide MSCS with data mapping information that would be required for information to be imported into the Applicant Tracking system.

**G. Training**

- The contractor shall provide the necessary training for system administrators, user personnel and systems support staff (if applicable). This training must assure that the users will be capable of continued operation of the solution. The training plans should also include related costs and materials, i.e. Reference Guides, Tutorials and Related CD's, etc.
- The Contractor shall provide on-site training and validation methods for the following: System Administrators and Human Resource Staff.

**H. Documentation**

- The software must be fully documented prior to acceptance of the software by MSCS, within standards set forth by MSCS. The Authority shall maintain the right to make a sufficient number of copies of all documentation for its own internal use. Documentation must include Management Overview, Detailed user instructions & Process Flow Diagrams, Technical Components including programs, files and procedures and Sample copies of documentation as part of the Proposal Outline.

**I. Warranties**

- The Contractor shall provide an application software warranty of at least twelve months as part of the software license agreement. The warranty must warrant

that the software is free of major defects and operates in accordance with the Contractor documentation and provides functions and performance as required by these specifications. The application software warranty shall commence at the completion of the testing phase and approval for final payment.

**J. Maintenance Agreement Acceptance Date**

- The first year of the maintenance agreement will commence at the completion of the testing phase and approval for final payment.

**K. Testing Period**

- The Proposer shall propose a testing phase for the proposed Applicant Tracking Software. The actual phase shall be determined by the MSCS.

**L. Software Support**

- Help Desk Service – The Contractor shall provide a Help Desk Service fully staffed with trained, experienced personnel between the hours of 8:00 A.M. to 5:00 P.M. CST/CDT Monday through Friday.
- The contractor shall include the 1st year of help desk service support within the Agreement at no additional charge.
- The 1st year of support shall begin after the completion of the testing phase and approval of the final payment.
- The proposal shall include estimated costs for annual support for five years.

Upon acceptance of the contract, the Contractor shall provide SLA (Service Level Agreement).

**M. Security**

- Contractor shall have evidence of a Security Incident Response Plan that includes customer notification and priority levels.
- Contractor shall provide evidence of its Business Continuity/Disaster Recovery Plan.
- Contractor shall provide evidence of a change management policy i.e. software patch and release cycles, upgrade path, change to product code.
- Contractor shall provide evidence and submission of a distinct Information Security Program (i.e. security model, policies, and procedures).

**N. File Back-Up/File Recovery**

- The Contractor shall provide procedures for adequate backup and recovery of files related to the proposed software.
- The procedure must assure, to a reasonable degree, that upon software failure that system databases are restored to their pre-failure status and that data integrity is maintained.
- Recovery from failure must be provided such that operation may be continued immediately following replacement of the failing component.

**O. Systems Software**

- The Contractor shall itemize all required and recommended software to make the proposed software operate in the most efficient manner. This is to include Operating System, Database, Web Browser, etc

## **PART VI: APPENDICES**



## **APPENDIX A - SPECIAL TERMS AND CONDITIONS FOR RFP'S**

These Terms and Conditions shall apply unless otherwise noted in General Terms and Conditions attached to individual bid request. It shall be the Vendor's sole responsibility to insure they are compliant with all applicable federal, state, and city laws, rules, ordinances, statutes, etc., that may impact this contract. SCBE shall bear no responsibility for monitoring the Vendor's compliance with said legal requirements. If the Vendor fails to maintain legal compliance, SCBE may find said Vendor in default.

### **1. REQUEST FOR PROPOSALS (RFP)**

- a. DIRECTIONS: SCBE invites all interested and qualified vendors to submit proposals to this RFP in accordance with directions specified in the attached General Terms and Conditions and these Special Terms and Conditions.
- b. DEFINITIONS: For the purpose and clarity of this document only, "SCBE" will mean The Shelby County Schools. Also, for the purpose and clarity of this document, "Vendor" will mean any reliable and interested broker, vendor, supplier, vendor, and/or manufacturer that want to respond to this RFP.

### **2. GENERAL REQUIREMENTS**

- a. AUTHORIZED DEALERS: Only authorized dealers may submit a proposal on requested equipment. At the discretion of SCBE, a certificate, executed by the manufacturer, may be requested stating that the Vendor is an authorized agent of the manufacturer and is duly authorized to service and maintain the equipment.
- b. INSPECTIONS: SCBE reserves the right to have inspectors on the premises of the manufacturer during the process of manufacture of any products being furnished under this RFP for as long as may be considered necessary by SCBE. All expenses of the inspectors shall be borne by SCBE. The presence of the inspectors at the site of manufacture of the products shall not relieve the Awarded Vendor of responsibility for faulty workmanship of materials that may be discovered at any time after delivery and prior to final acceptance in accordance with the specifications. In case of factory inspection of items being manufactured for SCBE, every facility shall be afforded inspectors by the manufacturers for the pursuance of their work.
- c. TYPES OF PURCHASES: These specifications are intended to cover the various types of purchases of equipment, materials, supplies, or services as shown to any or to each of the various public and charter schools, offices, or to any designated warehouse or warehouses in Shelby County.
- d. SINGLE PRICE: Unless otherwise specified in the General Terms and Conditions attached to this RFP, the Vendor will not be allowed to offer more than one price on each item even though the vendor may feel that it has two or more types or styles that will meet specifications. Vendor must determine which to offer. If said Vendor should submit more than one price on any item, all prices for that item will be rejected.
- e. AGGREGATE BIDS: Where provision is made on the proposal form for bidding items on an individual, group or aggregate basis, the award will be made on whichever basis is in the best interest of SCBE. When an aggregate bid is requested, the unit prices for each item shall be identified in the response. The unit prices in an aggregate bid should be consistent with the

total quoted price for an aggregate bid. No bid or a combination of items will be permitted except as noted in the General Terms and Conditions.

- f. **MINIMUM REQUIREMENTS:** Whenever mention is made of any article, material, or workmanship to be in accordance with laws, ordinances, building codes, underwriter's code, A.S.M.E. regulations, or similar expressions, the requirements of these laws, ordinances, etc., shall be construed as to the minimum requirements of these specifications. In case of any apparent conflict between the specifications and such laws, ordinances, etc., the Awarded Vendor shall call said conflict to the attention of SCBE Director of Purchasing & Supply Services for a decision before proceeding with any work.
- g. **USE OF BRAND NAMES:** Brand names and model numbers are offered as a reference for Vendors as to the style, size, weight, and other characteristics of the item(s) in the specifications. The use of such brand names should not be interpreted to be the exclusive brand desired unless so stated. The determination of the acceptability and/or the criteria for acceptability of an alternate is solely the responsibility of SCBE.
- h. **PRODUCT OFFERED BY THE VENDOR:** The product offered by the Vendor shall be new, not used, and the latest version of the product. Should a product be discontinued and/or upgraded during the course of the contract, the Vendor shall offer to SCBE a new alternate product that meets and/or exceeds the established specifications, under the same terms, conditions, and prices as the originally offered item.
- i. **COMPLIANCE WITH SPECIFICATIONS:** The Vendor shall abide by and comply with the true intent of the specifications and not take advantage of any unintentional error or omission but shall fully complete every part as the true intent and meaning of the drawings and specifications, as decided by the Procurement Director. Where the requirements of the specifications call for higher grade and are not in conflict with the laws, ordinances, etc., the specifications shall govern. Where the requirements of the laws, ordinances, etc., are mandatory, they shall govern. The successful Vendor, after award and before manufacture and/or shipment, may be required to submit working drawings or detailed descriptive data identified as acceptable to SCBE, which would provide sufficient data to enable SCBE to judge the Vendor's compliance with the specifications.
- j. **DEVIATIONS TO SPECIFICATIONS:** Any deviation from the specifications must be noted in detail by the Vendor, in writing, as an attachment to the response. The absence of a written list of specification deviations attached to the response will hold the Vendor strictly accountable to SCBE to the specification as written. Any deviation by the Awarded Vendor from the specifications, without prior documented approval, will be grounds for rejection of the goods and/or equipment when delivered.
- k. **Piggy Back Clause:** Shelby County Board of Education reserves the right to extend the terms, conditions, and prices of this contract to other Institutions (such as State, Local and/or Public Agencies) who express an interest in participating in any contract that results from this RFP. Each of the piggyback institutions will issue their own purchasing documents for purchasing of the goods. Proposer agrees that the Shelby County Board of Education shall bear no responsibility or liability for any agreements between Proposer and the other Institution(s) who desire to exercise this option.

Each participating jurisdiction or agency shall enter into its own contract with the Awarded Bidder(s) and this contract shall be binding only upon the principals signing such an agreement. Invoices shall be submitted in duplicate "directly" to the ordering jurisdiction for

each unit purchased. Disputes over the execution of any contract shall be the responsibility of the participating jurisdiction or agency that entered into that contract. Disputes must be resolved solely between the participating agency and the Awarded Bidder. SCBE does not assume any responsibility other than to obtain pricing for the specifications provided.

### 3. CONFLICT OF INTEREST

- i. In accordance with policy 1013 Superintendent Code of Ethics SCBE has promulgated Ethics Policies, which cover conflict of interest, financial disclosure, and lobbying. All bidders are expected to comply with any and all SCBE Ethics Policies that may apply to them individually or as a business entity.
- ii. All bidders should carefully review the conflict-of-interest policies. Specific attention should be accorded to SCBE Ethics Policies (SCBE Policy 1013) prohibiting SCBE employees from benefiting from business with the school system.
- iii. All bidders are placed on notice that all questions/interpretations concerning SCBE Ethics Policies may be submitted to the Ethics Review Panel in accordance with SCBE Policy 1013.

### 4. PRICES

- a. **UNIT PRICES:** Unit Prices must be rounded off to no more than two (2) decimal places, unless so specified in the General Terms and Conditions included with the RFP. All unit prices on items shall be completed on the proposal sheet(s). A NO BID notation must be completed for each item not being bid. In case of error in extension of prices in the proposal response, the unit price shall govern.
- b. **UNITS OF MEASURE:** Wherever SCBE indicates the unit of measure required and the Vendor's price is based on a different unit of measure, it shall be at the sole discretion of SCBE to determine whether the Vendor's price will be recalculated. SCBE will not accept any proposals with Vendor escalator clauses, unbalanced figures, or irregular features.
- c. **DELIVERY CHARGES:** All prices shall include be FOB Destination.
- d. **CASH DISCOUNTS:** Cash discounts will not be taken into consideration in determining a contract award. All discounts, other than prompt payment, are to be included in the bid price.
- e. **PRICE REDUCTIONS:** SCBE reserves the right to accept price reductions from the Awarded Vendor during the term of this contract to occur no less than thirty (30) days from the approval of the contract.
- f. **Tax Exemption.** SCBE is a tax-exempt entity and, as such, is exempt from the payment of taxes, including but not limited to sales and use taxes, federal excise taxes and federal high use taxes.

### 5. ITEM DELIVERY

- a. **GENERAL DELIVERY REQUIREMENTS:** All materials, supplies, and equipment for SCBE shall be delivered F.O.B. Destination. All deliveries must be inside the building. Delivery hours shall be Monday through Friday with the exception of holidays, to offices - between **8:30 a.m. and 3:30 p.m.**; to schools – between **9:00 a.m. and 2:30 p.m.** The Awarded Vendor(s) shall

be held responsible for clean-up and removal of all packing cartons, boxes, crates, packing materials, etc., from the premises after delivery and set up of any furniture and equipment. Drivers must be bonded, have a clean driving record, and have the appropriate training to handle hazardous items. Vendor will have the ability (including all applicable permits and licenses) to handle all types of shipments ranging from letters to multi-carton shipments, including bulky and fragile items. Delivery must include a current MSDS for each hazardous chemical or chemical compound delivered or used by the Vendor at a SCBE worksite. The Awarded Vendor shall be liable for the full replacement value of any delivery item lost or damaged.

- b. **SPECIAL DELIVERY INSTRUCTIONS:** Special Instructions for delivery dates, delivery of heavy equipment, materials or machinery requiring special handling, to schools/sites under construction and/or renovation or refrigerated goods will be defined in General Terms and Conditions.
- c. **PACKING:** All materials must be securely packed in accordance with accepted trade practices. SCBE Purchase Order number must be plainly visible on the exterior of each container. A packing slip and/or delivery ticket shall be included in each shipment. This ticket shall contain the following information: Purchase Order Number, Vendor Name, Name of the Article, Item Number, Quantity, and Delivery Location (Example: ABC Elementary School Library) and Bid/Contract Number. Failure to comply with this condition may be considered sufficient reason to refuse to accept the goods.
- d. **SAFETY REQUIREMENTS:** The Awarded Vendor shall provide all equipment and machinery furnished and delivered to SCBE complying with the Safety regulations as required by OSHA and the Tennessee State Safety Health Act known as MOSHA. The Vendor shall sign the safety section, if attached in the proposal response, certifying that the regulations for the type of equipment furnished shall meet all regulations applying to this type equipment meeting the CFR-1910 MOSHA Standard. The Vendor shall submit Material Safety Data Sheets (MSDS) for all items awarded to that vendor provided under the terms of this proposal in accordance with OSHA Communication Standard 29 CFR 1910.101, 29 CFR 1910.1200 and 29 CFR 1926.58 or any other applicable state, federal, or local regulation. Prior to delivery of the items awarded, the vendor must submit MSDS sheets to: SCBE Facilities Safety Officer, 1364 Farmville, Memphis, TN, 38122.
- e. **LIQUIDATED DAMAGES:** In the event the Awarded Bidder fails to deliver the goods or services of the contract in accordance with the specifications, SCBE reserves the right to purchase the goods/services on the open market in sufficient quantities to assure the continued operation of SCBE. All additional expenses incurred by SCBE as a result of such purchases will be deducted from the monies owed or monies that may become due the Vendor.

## **6. GUARANTEE AND WARRANTIES**

- a. **GENERAL REQUIREMENTS:** Payment shall be based upon acceptance of goods or services by SCBE. Vendor expressly warrants that: (a). The merchandise to be furnished and services performed will be free from defects in material and workmanship and will be in full conformity with the specifications, drawings, representation, or sample; that this warranty shall survive acceptance and payment of the merchandise; and that the Vendor will bear the cost of inspection of all goods and services rejected. (b). The Vendor hereby provides a warranty of authorization as to all goods and services. (c). The goods or services furnished must be or

have been mined, manufactured, or produced in full compliance with at least the minimum conditions required under the Fair Labor Standards Act of 1938, as amended, and all other applicable local, state and federal laws, rules, and regulations to include Department of Transportation (DOT), Food and Drug Administration (FDA) regulations, and the Equal Opportunity Clause contained in Executive Order 11246, as amended. If applicable to the goods or services purchased herein, vendor must also be in full compliance with the Workplace Hazardous Materials Information System (WHMIS) legislation and maintain a written Hazard Communication Plan.

- b. Awarded Vendor, its employees, agents, volunteers, and vendors who may have contact with students must be in compliance with Title 5, Subtitle 5, Part VI, of the Family Law Article of the Maryland Code. All costs thereof shall be borne by the Vendor.
- c. **GUARANTEE PERIOD:** The Vendor shall unconditionally guarantee all services, materials, and workmanship of all furniture, goods, and equipment furnished by it for a period of one year from the date of acceptance, i.e., delivery and installation, unless a longer period of warranty is specified in the General Terms and Conditions attached to the RFP.
- d. **OFFICE EQUIPMENT:** Vendor agrees to provide on-site service of equipment within eight (8) hours of notification by school system personnel. Loaner equipment shall be supplied; free of charge, during the warranty period if the office equipment cannot be repaired within three (3) working days.
- e. **OTHER EQUIPMENT:** Certain pieces of equipment, machinery, and refrigeration will require guarantees other than detailed above. Refer to General Terms and Conditions for requirements on specific equipment.
- f. **MANUFACTURER'S AGENT:** The Vendor shall act as the manufacturer's agent for all warranty claims.

## **7. FEDERAL GRANT FUNDS**

- a. The Respondent understands and agrees that it is possible federal grant funds may be used in connection with certain delivery orders issued pursuant to and under the contract agreement. Accordingly, prior to commencing and all work under any and all delivery orders pursuant to and under the contract agreement, the respondent shall ascertain and verify if federal grant funds are to be used by MSCS. If MSCS will use any federal funds in connection with a delivery order, it is the obligation of the respondent and the respondent understands and agrees that the respondent shall adhere to and comply with all applicable federal laws, regulations circulars, executive orders, procedures, and guidelines, as and if applicable, amended from time to time.

## **8. PROPOSAL SUBMISSION**

- a. **KNOWLEDGE OF TERMS AND CONDITIONS:** Vendors or their authorized representatives are expected to fully inform themselves as to the conditions, requirements, and specifications before submitting a proposal response. Failure to do so will be at the Vendor's own risk and Vendor cannot secure relief on the plea of error. Neither law nor regulations make allowance for errors of omission or commission on the part of Vendors.
- b. **SUBMISSION:** Proposals must be delivered to the Procurement Office, 160 S Hollywood Street, Room 126, Memphis, TN 38112. Vendors must submit a proposal as specified in the General Terms and

Conditions. Vendors shall retain one (1) copy of the proposal for their files. Proposals must be signed and submitted by an authorized representative of the company. Each Vendor may attach a letter of explanation to the proposal, if so desired (or required), to provide an explanation of any detail(s) in the proposal. This letter may not be used to offer optional or alternative proposals or pricing.

- c. **FORMAT:** Signed proposals must be delivered in sealed, opaque envelopes and clearly marked on the outside with: Name of Vendor, Due Date, RFP Number and Title. SCBE shall not accept any facsimile transmission to agents, representatives or employees as meeting the requirement of the Proposal. A facsimile document shall not be considered a valid response to the RFP.
- d. **VENDOR ADDRESS:** Each proposal must show the full business address, telephone number, email address and fax number of the Vendor and be signed by the person or persons legally authorized to sign contracts. All correspondence concerning the proposal and contract, including Notice of Award, copy of Contract, and Purchase Order, will be mailed or emailed to the address shown on the proposal in the absence of written instructions from the Vendor to the contrary.
- e. **PARTNERSHIPS:** Proposals by partnerships must be signed with the partnership name by one of the members of the partnership or by an authorized representative, followed by the signature and designation of the person signing, who shall also state the names of the individuals composing the partnership.
- f. **CORPORATIONS:** Proposals by corporations must be signed with the name of the corporation, followed by the signature and designation of the officer having authority to sign. When requested, satisfactory evidence of authority of the officer signing in behalf of the corporation shall be furnished. Anyone signing the proposal as agent shall file satisfactory evidence of authorization to do so.
- g. **CERTIFICATES AND AFFIDAVITS:** All Vendors shall be required to complete the certificates and/or affidavits that are incorporated into the General Terms and conditions of this RFP. Such documents are required by local, state, or federal funding agencies of SCBE as part of the bidding process. The documents may include: Anti-Bribery Affidavit, Debarment Certificate, Sales Tax Certification, Minority Business Enterprise affidavit, and when applicable, Asbestos Free Certification.
- h. **SAMPLES:** When indicated in the General Terms and Conditions, a properly tagged sample and descriptive data shall be submitted to the address specified no later than the date specified in the Schedule of Events included in the General Terms and Conditions. The tag on the sample shall indicate the item number, the name of the company submitting the sample, and the RFP number. SCBE will not be responsible for any samples not picked up within 30 days of the notification of Vendors to do so. Samples may be retained by SCBE until Vendors are notified to remove them. Vendors agree that SCBE will incur no liability for samples that are damaged, destroyed, lost, or consumed in testing processes. Failure to submit the above information when requested is sufficient grounds for rejection of the proposal.
- i. **SPECIAL SAMPLES WITH CERTIFIED APPROVAL:** Some successful Vendors shall be required to submit two (2) samples of each product awarded with an affidavit stating that the chemical composition of the sample submitted is identical with the composition tested prior to the proposal and all remain unchanged during the period of the contract. This requirement shall be part of the specifications of the product or products requested. Failure to submit the above information when requested is sufficient grounds for rejection of the proposal.
- j. **PROPOSAL PREPARATION FEES:** SCBE will not be responsible for any costs incurred by a Vendor in preparing and submitting a proposal response.
- k. **PROPOSAL EVALUATION** Proposal responses will be evaluated for compliance with detailed specifications. The specifications shall vary with each individual RFP issued, and the award shall be made in accordance with the General Terms and Conditions. Consideration will be given to the quantities, time required for delivery, purpose of the goods/services, competency and responsibility of the Vendor, and the ability of the Vendor to perform satisfactorily. Evaluation may also be made for other factors, such as serviceability, functional suitability, workmanship, safety in use, and overall product quality, where acceptability may be determined on the basis of professional judgment and educational application.

SCBE will consider the Vendor's record and performance of any prior contracts with SCBE, federal departments or agencies, or with other public bodies.

- I. RECOMMENDATION OF AWARD: Recommendation of an award of a contract will be made in accordance with the General Terms and Conditions.

## **9. RESOLUTION FOR PROTEST AND DISPUTES**

The Procurement Director shall attempt to resolve informally all protests of bid award recommendations. Vendors are encouraged to present their concerns promptly to the buyer for consideration and resolution. Open dialogue is helpful for all parties and disputes are often only a misunderstanding of the evaluation and recommendation process.

### **A. RIGHT TO PROTEST**

Prior to the commencement of an action in court concerning the controversy, any actual vendor who claims to be aggrieved in connection with a solicitation, the solicitation process, or a pending award of a contract may protest to the Buyer. Procurement Director shall attempt to resolve informally all protest of award recommendations. Protest shall be submitted in writing within seven (7) days after such claimant knows or should know of the facts giving rise to the protest

1. An aggrieved bidder of standing or Vendor may protest to the Buyer a proposed award of a contract for supplies, equipment, services, or maintenance. A bidder of standing is a bidder who would be directly next in line for an award should the protest be supported.
  - a. The protest shall be in writing addressed to the Buyer with a copy to the Procurement Director and shall include the following:
    - The name address and telephone number(s) of the protester.
    - Identification of the solicitation
    - Statement of reasons for the protest
    - Supporting documentation to substantiate the claim
    - The remedy sought
2. The protest must be filed with the Procurement Office within seven (7) calendar days of the recommendation of award or notification to the bidder or Vendor that their bid or proposal will be rejected.
3. A vendor who does not file a timely protest before the contract is executed by the Board is deemed to have waived any objection.
4. The Procurement Director shall inform the Chief of Business Operations (CBO) upon receipt of the protest.
5. The Procurement Director shall confer with the general counsel prior to issuance of a decision regarding disputes of contracts or awards.

### **B. BOND REQUIREMENTS**

1. Neither a protest nor a stay of award shall proceed under this section unless the protesting party posts a protest bond. The protesting party shall post with the Procurement Director, at the time of filing a notice of protest, a bond payable to the Shelby County Board of

Education in the amount of five percent (5%) of the lowest cost proposal evaluated or, if a protest is filed prior to the opening of cost proposals, the bond payable shall be five percent (5%) of the estimated maximum liability provided in the procurement document. The protest bond shall be in form and substance acceptable to the Shelby County Board of Education and shall be immediately payable to the Shelby County Board of Education conditioned upon a decision by the protest committee that:

- a. A request for consideration, protest, pleading, motion, or other document is signed, before or after appeal to the Chief of Business Operations, in violation of subsection (b);
  - b. The protest has been brought or pursued in bad faith; or
  - c. The protest does not state on its face a valid basis for protest.
2. The bond shall be payable to the Shelby County Board of Education for any other reason approved by the Procurement Office. The Board of Education shall hold the protest bond for at least eleven (11) calendar days after the date of the final determination by the Procurement Director. If the protesting party appeals the Procurement Director's determination to the protest committee, the Procurement Director shall hold the protest bond until instructed by the General Counsel Office to either keep the bond or return it to the protesting party.
  3. At the time of filing notice of a protest of a procurement in which the lowest bid or lowest evaluated cost proposal is less than one million dollars (\$1,000,000), a minority-owned business, woman-owned business, service-disabled veteran-owned business, or small business protesting party may submit a written petition for exemption from the protest bond requirement of subsection (c). The petition shall include clear evidence of a minority-owned business, woman-owned business, service-disabled veteran-owned business, or small business status. On the day of receipt, the petition shall be given to the chief procurement officer. The chief procurement officer has seven (7) calendar days in which to make a determination. If an exemption from the protest bond requirement is granted, the protest shall proceed as though the bond were posted. Should the chief procurement officer deny an exemption from the requirement, the protesting party shall post the protest bond with the chief procurement officer as required in subsection (c) within five (5) calendar days of the determination.

### **C. APPEAL OF CONTRACT AWARD DECISION**

1. The Procurement Director shall issue a decision in writing. Any decision of an award protest may be appealed to the CBO within seven (7) days of issuance of the decision by the Procurement Director
2. Any decision of an award protest may be appealed to the Superintendent within seven (7) days of issuance of the decision by the Chief of Business Operations.
3. The Superintendent will evaluate the issues involved and render a decision. The decision of the Superintendent is final.



## **10. CONTRACT TERM**

The Vendor shall refer to the General Terms and Conditions attached to the RFP for details regarding the Term of Contract for this solicitation.

## **11. COMMENCEMENT OF SERVICES**

SCBE shall have no obligation to pay for services performed before SCBE approves the contract or after it ends. SCBE shall have no obligation to pay for services in excess of the monetary amount of the award. SCBE shall have no obligation to pay for services before a purchase order is issued.

## **12. ADDENDA**

- a. **INQUIRIES:** No interpretation of the meaning of the specification or other documents will be made to any Supplier orally. To be given consideration, inquiries must be received as outlined in Part II Item 4.0. Unless otherwise specified in the General Terms and conditions, inquiries are to be emailed to the Buyer, "INQUIRY" and the RFP name and number must be noted on the envelope. Alternatively, inquiries may be e-mailed to the Buyer. The subject field of the e-mail must include "INQUIRY" and the Bid name and number.
- b. **ISSUANCE:** Any changes to the RFP specifications will be made through the appropriate addenda. Failure of any Supplier to receive such addenda or interpretation shall not relieve any Supplier from any obligations under this RFP as amended by all addenda. All addenda so issued shall become part of the award.

## **13. ANNULMENTS AND RESERVATIONS**

- a. **RIGHT TO REJECT:** SCBE reserves the right to exercise its statutory option to reject any or all proposals and re-advertise for other proposals. SCBE reserves the right to order the said equipment, materials, supplies, or services as described within the specifications, and SCBE also reserves the right not to order any items(s) within the specification.
- b. **WAIVER OF TECHNICAL DEFECTS:** SCBE reserves the right to waive technical defects, if in its judgment the interest of SCBE shall so require.
- c. **CONTRACT RESERVATIONS:** SCBE reserves the right to annul any contract if, in its opinion, there shall be a failure, at any time, to perform faithfully any of its stipulations, or in case of any willful attempt to impose upon SCBE materials, products and/or workmanship inferior to that required by the Vendor, and any action taken in pursuance of this latter stipulation shall not affect or impair any rights or claims of SCBE to damages for the breach of any covenant of the contract by the Vendor(s). Should the Vendor(s) fail to comply with the conditions of this contract or fail to complete the required work within the time stipulated in the contract, except for circumstances beyond its control, including, but not limited to, Acts of God, war, flood, governmental restrictions, or the inability to obtain transportation, SCBE reserves the right to purchase the required articles in the open market or to complete the required work at the expense of the Vendor(s). Should the Vendor be prevented from furnishing any item or items, or from completing the required work included in the contract, by reason of such failures caused by circumstances beyond its control, including but not limited to Acts of God, war, flood, governmental action, or the inability to obtain transportation, SCBE reserves the right to withdraw such items or required work from the operation of this contract without incurring further liabilities.

- d AUTHORITY TO DEBAR OR SUSPEND The Procurement Director shall have the authority to request to debar a person or company for cause from consideration for award of contracts.

#### 14. TERMINATION OF CONTRACT

- a TERMINATION FOR NON-APPROPRIATION OF FUNDS: SCBE may terminate this contract, in whole or in part, due to insufficient funding or non-appropriation of funds with written notice to the Vendor. SCBE shall pay for all of the purchases, if any, incurred up to the date of the termination notice.
- b TERMINATION FOR DEFAULT: When the Vendor has not performed or has unsatisfactorily performed the contract, payment shall be withheld at the discretion of SCBE. Failure on the part of a Vendor to fulfill contractual obligations shall be considered just cause for termination of the contract, and the Vendor is not entitled to any costs incurred up to the date of termination. In the event of a default by the vendor, this Contract may be terminated.
- c TERMINATION FOR CONVENIENCE: SCBE has the right to terminate this Agreement at any time, without any liability, upon five (5) days prior written notice to Vendor, provided that Vendor shall be compensated for services rendered prior to the date of termination.
- d Each participating jurisdiction and/or local educational agency (LEA) public school district has the right to withdraw from the terms of the contract without showing cause, by providing thirty (30) calendar days' written notice to the vendor(s). The participating jurisdiction/ LEA shall pay all reasonable costs incurred by the vendor(s) up to the date of termination. The vendor(s) shall not be reimbursed for any anticipatory profits which have not been earned up to the date of termination.

Language to support Termination for Convenience by the vendor(s) shall be so stipulated in the contract document between jurisdiction/ LEA and the vendor(s). Such language, when included, shall take precedence over the language of this specification.

#### 15. GOVERNING LAW & VENUE

- a. The RFP shall be construed in accordance with, and interpreted under, the laws of the State of Tennessee. Any lawsuits arising out of such RFP shall be filed in the Circuit Court of Memphis, Tennessee.

#### 16. CONTRACT TERMS AND CONDITIONS

- a. SUBMISSION OF INVOICES: Supplier agrees to accept the line item price on the purchase order as final payment. All invoices are to be submitted promptly showing Purchase Order number, and name and address of recipient and mailed to SHELBY COUNTY BOARD OF EDUCATION, Accounts Payable Office, Room 160 S. Hollywood St., Room 250, Memphis, TN 38112 (unless otherwise noted). **Vendors must receive written authorization from Procurement to redirect invoice submission to another location other than Accounts Payable.**
- b. INCORRECT INVOICES: Incorrect invoices will be returned for correction or paid in accordance with the purchase order. Each invoice shall identify SCBE Purchase Order Number, line item number and item descriptions or services shall be listed in the same order as on the Proposal and/or Purchase Order.

- c. PARTIAL PAYMENTS: Payment in full will only be made upon final acceptance of items as shown on Purchase Order. Partial payments are permissible.
- d. LATE SUBMISSION OF INVOICES: The parties acknowledge and agree that the Vendor's invoices are to be submitted in a timely manner, per the terms of the purchase order, after the services have been provided or the goods and materials have been provided. If invoices are submitted after one calendar year after the Vendor's services have been rendered or the last date when goods and materials were accepted by SCBE, then SCBE shall have no obligation to pay for the stale invoices.
- e. CONFIDENTIALITY: Vendor acknowledges and agrees to hold all Confidential Information in the strictest confidence as a fiduciary and will not make any press release or public announcement, or voluntarily sell, transfer, publish, disclose, display or otherwise make available to any third persons such Confidential Information or any portion thereof without the express written consent of SCBE. Vendor and its employees, agents, volunteers and vendors shall maintain the confidentiality of all medical, psychological, and student records in compliance with federal and state laws. Additionally, Vendor shall procure from the parent or guardian of each student receiving services hereunder a written consent in favor of Vendor and SCBE for the mutual disclosure of such records by and among the Vendor, SCBE and SCBE' employees, agents, volunteers and vendors.
- f. INDEMNIFICATION: Vendor shall indemnify, defend, and hold harmless the SHELBY COUNTY BOARD OF EDUCATION, Superintendent and their respective elected/appointed officials, employees, departments, agencies, agents and volunteers from any and all claims, demands, suits, and actions, including attorney's fees, litigation expenses and court costs, connected therewith, brought against the SCBE and their respective elected/appointed officials, employees, departments, agencies, agents, and volunteers, arising as a result of direct or indirect, willful, or negligent act or omission of the Vendor or its employees, agents, or volunteers.
- g. INSURANCE:
  - 1. The vendor must maintain and pay for Comprehensive Business Insurance to protect their claims under the Workers' Compensation Act, from claims or damages because of bodily injury to others, including employees of SCBE, damage to the property of others, including SCBE, claims for damages arising out of the operation of motor vehicles, which may arise during the performance of the contract whether caused by themselves or by any sub-vendor or anyone directly or indirectly employed by either of them, and Product Liability Insurance. Said insurance is to cover the duration of the contract under an express or implied warranty.

All contractors, vendors or service providers coming on to District premises to do work or provide services are required to have insurance. Insurance is necessary to cover any claims or losses for which the contractor/vendor may be responsible for. Schools or central office departments should verify a current Certificate of Insurance, including endorsements from the contractor or vendor is on file with Procurement Services prior to the beginning of work and/or the start of a contract. A Certificate of Insurance is a standard form issued by the insurance company evidencing the insurance information (including policy limits and types of insurance) of its policyholder.

2. The following coverages and limits are required of all vendors: The following minimum insurance standards shall apply to all vendors performing, selling, or distributing products and

services at Shelby County Schools. If a product or service, in the opinion of Risk Management, represents an unusual or exceptional risk, additional insurance for that product or service may be required.

- **Commercial General Liability Insurance:** Including Bodily Injury and Property Damage Liability, Independent Contractors Liability, Contractual Liability, in an amount not less than \$1,000,000, Product Liability and Completed Operations Liability in an amount not less than \$2,000,000 combined single limit, per occurrence, and \$2,000,000 aggregate.
- **Workers' Compensation:** \$1,000,000. If the contractor/vendor has less than 5 employees, a statement on the vendor letterhead should be placed on file.
- **Employers Liability Coverage:** \$1,000,000.
- **Automobile Liability:** For vendors who will drive on District property, Automobile Liability in an amount not less than \$1,000,000 per occurrence for bodily injury and property damage, including owned, hired and non-owned vehicle coverage.
  - For Charter Bus Companies, the minimum Automobile Liability coverage required is \$5,000,000.

#### **Other Insurance Coverage That May Be Required:**

- **Professional Liability (Errors & Omissions):** Not less than \$1,000,000 per occurrence and aggregate to be maintained for the duration of the agreement and three years following its termination.
  - This insurance requirement applies when a supplier has a professional designation or license and/or is providing professional services. The minimum limit for architects and engineers is \$2,000,000 per occurrence and in the aggregate and may be increased depending upon the nature of the services to be provided to the District.
- **Umbrella or Excess Liability Coverage:** Not less than \$4,000,000 per occurrence and in the aggregate.
  - This coverage typically sits above the underlying General Liability, Automobile Liability and Professional Liability policies. Depending on the scope and work to be performed in the proposed agreement, this policy may be required in order for the vendor to be able to meet the minimum insurance requirements.
  - Required for all construction, security, IT, and healthcare related contracts.
- **Cyber Risk Insurance:** Not less than \$2,000,000 per claim to be maintained for the duration of the agreement and three years following its termination.

- This insurance requirement applies when a third party will be using, storing, or accessing private, confidential or protected information.
- **Environmental Liability:** Not less than \$2,000,000 per claim and in the aggregate.
  - This insurance requirement applies when a vendor will be performing environmental clean-up work (decontamination/remediation), will be working with hazardous substance or waste, or may have similar such exposures while performing work under the proposed agreement. Higher limits of environmental liability coverage may be required depending upon the scope of work.

Vendors and contractors shall name the Board of Education Shelby County Schools, its officers, agents, employees, and volunteers as an additional insured on its general liability insurance policy.

Coverages and limits are to be considered as minimum requirements and in no way limits the liability of the vendor, contractor, or service provider.

All policies shall evidence insurance written by carriers authorized to conduct business in the State of Tennessee and rated at least "A" in A.M. Best's Key Rating Guide.

Renewal certificates of insurance shall be provided annually to Procurement Services until all work is completed.

Please contact Risk Management, Sandra Burgess, [burgessse@scsk12.org](mailto:burgessse@scsk12.org) or 416-1997 with any questions.

3. The certificate on this insurance shall be made in favor of the **Shelby County Board of Education, Memphis TN 38112** and indicate paid up coverage for the term of the contract.
4. The certificate of insurance **TO BE SUBMITTED** to the PROCUREMENT OFFICE, 160 S. HOLLYWOOD ST., MEMPHIS, TN 38112.
5. It will be the responsibility of the successful Respondent(s) to ensure that a **current** Certificate of Insurance is on file in the Purchasing Office during the entire period of the contract.
6. The cost of the above insurance shall be considered an overhead or operating expense to the Vendor, similar to rental costs, utilities, automobile liability insurance, and other business-related expenses. **The premiums or costs to provide the above insurance shall not be directly related to the cost of the work or services specified in this Request for Proposal.**
- h. **NON-ASSIGNABILITY:** This contract shall not be assigned, or services subcontracted in whole or in part without the written consent of SCBE. Any attempt to do so without such written consent shall be null and void of no effect.

- i. **INDEPENDENT VENDOR:** Vendor is furnishing its goods and/or services hereunder as an independent Vendor, and nothing herein shall create any association, partnership or joint venture between the parties hereto or any employer-employee relationship.
- j. **GENERAL RECORDS CLAUSE:** Vendor's contracts, files, accounts, records, and other documents related to this Contract shall be open to examination and/or audit by SCBE and made available by the Vendor to SCBE and/or its designated agents at any time upon reasonable prior notice, during performance under this Contract and for a period of four (4) years after final payment or such longer period of time as required by law or rule or regulations.
- k. **SOLE AGREEMENT:** This Contract constitutes the sole agreement between the parties hereto and no amendment, modification or waiver of any of the terms and conditions hereof shall be valid unless in writing and executed by both parties. Any prior verbal agreements or proposals shall not be considered a part of this Contract.
- l. **PROTECTION OF PROPERTY:** Vendor will use reasonable care to avoid damaging existing buildings, equipment, and property at SCBE sites and all material furnished by SCBE ("Property"). If the Vendor's failure to use reasonable care causes damage to any property, Vendor must replace or repair the damage at no expense to SCBE as directed by the Contracting Officer. If the Vendor fails or refuses to make such repair or replacement, the Vendor will be liable for the cost, which may be deducted from payments due Vendor.
- m. **PUBLIC STATEMENTS:** Vendor shall not use or reference the Name or Emblem of SCBE in issuing any press releases or otherwise making any public statement with respect to this Contract (unless such press release or statement is required by applicable law regulation or the requirements of any listing agreement with any applicable stock exchange) without the prior written consent of SCBE, which consent will not be unreasonably withheld. Purchase by SCBE of any articles, material, merchandise, or service does not imply that SCBE has either adopted or endorsed the product of service, and the use by any manufacturer, Vendor, merchant or other person of the name or emblem of SCBE in any advertisement that they are furnishing products or services is not authorized. The unauthorized use of the name or emblem of SCBE is prohibited by the United States Criminal Code - Section 706.

## **17. CHANGES IN TERMS OR DELIVERY/COMPLETION DATE**

After award of individual contracts, any questions or correspondence related but not limited to the following matters must be directed to the PROCUREMENT OFFICE SHELBY COUNTY BOARD OF EDUCATION, MEMPHIS, TENNESSEE, 38112, in writing:

In the event of strikes, Acts of God, or other circumstances beyond the vendors control which prevent completion of service or delivery, the vendor must secure temporary contractual relief. The circumstances and duration must be stated by the vendor in writing and be forwarded to the PROCUREMENT OFFICE within ten (10) days after their development. Contractual relief shall be only that which is acceptable to and in agreement with the PROCUREMENT OFFICE, for those goods and services which are necessary for the day-to-day needs of SCBE.

**APPENDIX B-ADDENDUM ACKNOWLEDGEMENT**

**RFP #082924MT HR Talent Management System**

(If applicable) Please complete and return with your bid response.

I the undersigned acknowledge the receipt of the following addenda to this solicitation

Addendum #1- Date Received \_\_\_\_\_

Addendum #2 - Date Received \_\_\_\_\_

Addendum #3 - Date Received \_\_\_\_\_

Addendum #4 - Date Received \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Vendor Name

\_\_\_\_\_  
Email

\_\_\_\_\_  
Contact Phone Number

|

**APPENDIX C – REFERENCES**

**RFP #082924MT HR Talent Management System**

1.

**Client Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Services Provided:** \_\_\_\_\_

**Date(s)of services:** \_\_\_\_\_

**Contact Name & Title:** \_\_\_\_\_

**Phone No:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

2.

**Client Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Services Provided:** \_\_\_\_\_

**Date(s)of services:** \_\_\_\_\_

**Contact Name & Title:** \_\_\_\_\_

**Phone No:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

3.

**Client Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Services Provided:** \_\_\_\_\_

**Date(s)of services:** \_\_\_\_\_

**Contact Name & Title:** \_\_\_\_\_

**Phone No:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_



**APPENDIX D - NON-COLLUSION CERTIFICATE**  
(TO BE SUBMITTED WITH TECHNICAL PROPOSAL)

**RFP #090524MT**  
**HR Talent Management System**

I HEREBY CERTIFY that I am the \_\_\_\_\_ and the duly authorized

representative of \_\_\_\_\_

whose address is \_\_\_\_\_ and

THAT NEITHER I nor, to the best of my knowledge, information, and belief, the above firm nor any of its other representatives I here represent:

(a) Have agreed, conspired, connived or colluded to produce a deceptive show of competition in the compilation of the RFP or offer being submitted herewith;

(b) Have in any manner, directly or indirectly, entered into any agreement, participated in any collusion to fix the RFP price or price proposal of the bidder or Vendor herein or any competitor, or otherwise taken any action in restraint of free competitive bidding in connection with the Contract for which the within RFP or offer is submitted.

In making this affidavit, I represent that I have personal knowledge of the matters and facts herein stated.

\_\_\_\_\_  
(SIGNATURE)

\_\_\_\_\_  
(DATE)

\_\_\_\_\_  
(PRINTED OR TYPED NAME)

Subscribed and sworn before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

x \_\_\_\_\_ Notary Public

My commission expires: \_\_\_\_\_

**APPENDIX E - DEBARMENT AFFIDAVIT**  
(TO BE SUBMITTED WITH TECHNICAL PROPOSAL)

**RFP #090524MT**  
**HR Talent Management System**

**Certification Regarding Debarment, Suspension  
Ineligibility and Voluntary  
Exclusion—Primary and/or Lower Tier Covered Transactions**

- (1) The prospective participant certifies to the best of its knowledge, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.
- (2) The prospective participant and its principals have not, within a three (3) year period preceding this proposal, been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.
- (3) The prospective participant and its principals are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses in Paragraph 2 of this certification.
- (4) The prospective participant and its principals have not, within a three (3) year period preceding this application/proposal, had one (1) or more public transactions (Federal, State, or local) terminated for cause or default.
- (5) Where the prospective participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Signature of:

x \_\_\_\_\_  
Bidder, if the bidder is an individual

x \_\_\_\_\_  
Partner, if the bidder is a partnership

x \_\_\_\_\_  
Officer, if the bidder is a corporation

Subscribed and sworn before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

x \_\_\_\_\_ Notary Public  
My commission expires: \_\_\_\_\_

**APPENDIX F- ANTI-BRIBERY AFFIDAVIT**  
(TO BE SUBMITTED WITH TECHNICAL PROPOSAL)

**RFP #090524MT**  
**HR Talent Management System**

\_\_\_\_\_, being first duly sworn deposes and says that he is an officer in the organization known as \_\_\_\_\_ and the party making a certain proposal or RFP dated, \_\_\_\_\_ 20\_\_\_\_, to the Shelby County of Education:

I further confirm that: Neither I, nor to the best of my knowledge, information, and belief, the above business (as in defined in Section 39-16-101 of the State of Tennessee Code of Ethics Ordinance or any of its officers, directors, partners, or any of its employees directly involved in obtaining or performing contracts with public bodies (as is defined in Section 39-16-102 Bribery of Public Servant has been convicted of bribery, attempted bribery, or conspiracy to bribe in violation of Tennessee Law, or of the law of any other state or federal law, except as follows (indicate the reasons why the affirmation cannot be given and list any conviction, plea, or imposition of probation before judgment with the date, court or administrative body, sentence or disposition, the name(s) of person(s) involved, and their current positions and responsibilities with the business):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature of:

x \_\_\_\_\_  
Bidder, if the bidder is an individual

x \_\_\_\_\_  
Officer, if the bidder is a corporation

x \_\_\_\_\_  
Partner, if the bidder is a partnership

Subscribed and sworn before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

x \_\_\_\_\_ Notary Public

My commission expires: \_\_\_\_\_

**APPENDIX G - CERTIFICATE OF INSURANCE COVERAGE  
(TO BE SUBMITTED WITH PROPOSAL)**

**RFP #090524MT  
HR Talent Management System**

VENDOR NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

NAME OF SURETY: (TYPE OR PRINT) \_\_\_\_\_

NAME OF AGENT: (TYPE OR PRINT) \_\_\_\_\_

AGENT'S PHONE NO: \_\_\_\_\_

The below signed hereby certifies that the following information is true and correct. [Please note there may be other minimum coverage requirements based on the specifics of the project. Please see Appendix A-16 (Contract Terms and Conditions) – g (Insurance).]

<b>TYPE OF COVERAGE</b>	<b>MINIMUM REQUIRED LIMITS</b>	<b>POLICY OR BINDER NUMBER</b>	<b>ACTUAL LIMITS PROVIDED</b>	<b>EXPIRATION DATE</b>
COMMERCIAL GENERAL LIABILITY OCC	\$1,000,000			
COMMERCIAL GENERAL LIABILITY AGG	\$2,000,000			
BUSINESS AUTOMOBILE LIABILITY	\$1,000,000 PER OCCURRENCE			
EMPLOYERS LIABILITY	\$1,000,000			
WORKMAN'S COMP	\$1,000,000			

( ) LIMITS ON ABOVE POLICY WILL BE INCREASED      ( ) ABOVE POLICY NOW IN EFFECT

( ) POLICY WILL BE OBTAINED/ISSUED ON \_\_\_\_\_

The following additional clauses will be considered a part of the above policy(s), the same as if specifically written therein, as pertains to the above stated contract.

- SCBE is hereby named as Additional Insured.
- The policy(s) cannot be reduced or cancelled without at least forty-five (45) days prior written notice to SCBE.
- The insurance company is prohibited from pleading government function in the absence of any specific written authority by SCBE.
- The policy(s) will be automatically included and cover all phases of work, equipment, persons, et cetera which are normally covered while performing work under the above contract, whether specifically written therein or not.
- SCBE is hereby granted authority to contact the agency directly to confirm SCBE information or obtain copies of certificates of insurance. SCBE bears no responsibility for premiums or other cost of insurance. If policy(s) is not currently in effect, it will be written immediately upon notice of award, and a copy of binder or certificate will be sent directly to SCBE. A properly executed copy of this document shall be legally binding as a Carrier Certificate of Insurance Form.

The successful bidder will be required to provide insurance coverage as shown in General Conditions of RFP and Contract, prior to beginning any work. This insurance coverage must be maintained throughout the life of the contract. **PROOF THAT COVERAGE IS EITHER CURRENTLY IN PLACE OR WILL BE PROVIDED MUST BE SUBMITTED WITH THE BID.** This can be done by one of the two following methods:

Complete form "CERTIFICATION OF INSURANCE COVERAGE" or

Submit a Certificate of Insurance on a form provided by your Insurance Agent. This form must include the following clauses:

SCBE is hereby named as Additional Insured.

The policy(s) cannot be reduced or canceled without at least forty-five (45) days' prior written notice to SCBE.

The insurance company is prohibited from pleading government function in the absence of any specified written authority from SCBE.

The policy(s) will automatically include and cover all phases of work, equipment, persons, et cetera which are normally covered while performing work under the above contract, whether specifically written therein or not.

Regardless of the method used, the form **MUST** be totally complete, **MUST** show that all Limits of Insurance are or will be met, and **MUST** be signed by the Agent.

Failure to provide the required insurance coverage by either of the two (2) methods described above when the RFP is submitted may result in rejection of your RFP as being non-responsive.

\_\_\_\_\_  
(AUTHORIZED AGENT'S SIGNATURE)

\_\_\_\_\_  
(DATE)

## **LOCAL PREFERENCE PURCHASING**

### **I. PURPOSE**

To give a local preference to businesses located in Shelby County, Tennessee for the purchase of supplies, materials, equipment, and services.

### **II. SCOPE**

This policy applies to District level contracts with a total dollar purchase greater than \$25,000.

### **III. DEFINITION**

- A. Local Preference Purchasing means giving preference to businesses located within Shelby County, Tennessee in the purchase of personal property, materials, and contractual services and in constructing improvements to real property or to existing structures.
- B. Local Business means a vendor or contractor who holds a valid license to do business in Shelby County, Tennessee; has a street address within the limits of said locality for a continuous period of at least six (6) months prior to bid or proposal opening date; and has proof that Shelby County Personal Taxes are current (applies to local businesses who have been doing business in Shelby County, Tennessee for a year or more).

### **IV. POLICY STATEMENT**

The Shelby County Board of Education recognizes that a significant amount of funds are spent on purchasing personal property, materials, and contractual services and in constructing improvements to real property or to existing structures. The Board also recognizes that dollars used in making purchases are derived largely from revenues generated from businesses located within Shelby County, Tennessee. The Board believes that funds generated in the community should be placed back into the local economy. Therefore, it is the policy of Shelby County Board of Education to provide a preference to local businesses in procurement transactions whenever the application of such a preference is reasonable in light of the dollar-value of proposals received in relation to such expenditures.

In the bidding of, or letting for procurement of supplies, materials, equipment and services, with a total price greater than \$25,000, if the lowest responsive bidder is a regional or nonlocal business, then all bids received from Local Businesses are decreased by five (5) percent. The original bid is not changed; the five (5) percent is calculated only for the purpose of determining the Local Preference. The Local Preference cost differential is not to exceed one hundred thousand dollars (\$100,000.00).

In the case of request for proposals, letters of interest, best evaluated bids, qualifications or other solicitations and competitive negotiation and selection in which objective factors are used to evaluate the responses, Local Businesses will be assigned five (5) percent of the total evaluation points up to a maximum of five (5) points.

In the event of a tie between a local and non-local business, favor shall be given to the Local Business and a coin toss method will be used to break ties between two (2) or more local businesses meeting said specifications.

### **Exceptions**

This preference shall not apply to purchases or contracts that are funded in whole or in part by a governmental entity if the laws, regulations or policies governing such funding prohibit application of the Local Preference; when exigent emergency conditions or noncompetitive situations exist; and when a particular purchase, contract, or category of contracts for which MSCS is the awarding authority is waived upon written justification and recommendation of the Board.

### **Restrictions**

The Local Preference shall apply to District level purchases only. The preference shall apply to new contracts for supplies, materials, equipment, and services first solicited after January 29, 2013.

## **V. RESPONSIBILITY**

- A. The "users" of services are responsible for furnishing an objective evaluation of their needs and for identifying the specifications of the services to be delivered.
- B. The Chief Financial Officer is responsible for developing final specifications and obtaining all bids, requests for proposals, and contracted service agreements.
- C. The Chief Financial Officer is responsible for ensuring that all services have been properly approved and all procedures followed before signing contractual agreements.
- D. The Superintendent is responsible for ensuring compliance with this policy.



**Appendix I – Pricing Schedule**

**RFP #090524MT  
HR Talent Management System**

**PRICE OF SERVICES:**

Pricing shall be broken down as follows: The Price which the Respondent will charge MSCS for the Services is set forth below.

**Year 1**

**Software License Fee: \$ \_\_\_\_\_**

**a. Year 1 \$ \_\_\_\_\_ (based on approx. number of 14,000+ employees)**

**b. Year 2 (Optional Renewal) (based on approx. number of 14,000+ employees) \$ \_\_\_\_\_**

**c. Year 3 (Optional Renewal) (based on approx. number of 14,000+ employees) \$ \_\_\_\_\_**

**d. Year 4 (Optional Renewal) (based on approx. number of 14,000+ employees) \$ \_\_\_\_\_**

**e. Year 5 (Optional Renewal) (based on approx. number of 14,000+ employees) \$ \_\_\_\_\_**

**2. Annual Maintenance Fees: \$ \_\_\_\_\_**

**a. Year 1 \$ \_\_\_\_\_**

**b. Year 2 (Optional Renewal)  
\$ \_\_\_\_\_**

**c. Year 3 (Optional Renewal)  
\$ \_\_\_\_\_**

**d. Year 4 (Optional Renewal)  
\$ \_\_\_\_\_**

**e. Year 5 (Optional Renewal)  
\$ \_\_\_\_\_**

**Professional Development – On-going**

**a. Year 1 – Training Total Cost:**

**\$ \_\_\_\_\_**

**(# of Hours Included: \_\_\_\_\_)**

**b. Year 2 – (Optional Renewal) Training Total Cost:**

\$ \_\_\_\_\_  
(# of Hours Included: \_\_\_\_\_)

**c. Year 3 – (Optional Renewal) Training Total Cost: \$ \_\_\_\_\_**

(# of Hours Included: \_\_\_\_\_)

**d. Year 4 – (Optional Renewal) Training Total Cost:**

\$ \_\_\_\_\_  
(# of Hours Included: \_\_\_\_\_)

**e. Year 5 – (Optional Renewal) Training Total Cost:**

\$ \_\_\_\_\_  
(# of Hours Included: \_\_\_\_\_)

**4. Implementation Fees (IF ANY)**

**Onsite Training:**

**a. Year 1 \$ \_\_\_\_\_**

**b. Year 2 (Optional Renewal)**

\$ \_\_\_\_\_

**d. Year 3 (Optional Renewal)**

\$ \_\_\_\_\_

**d. Year 4 (Optional Renewal)**

\$ \_\_\_\_\_

**e. Year 5 (Optional Renewal)**

\$ \_\_\_\_\_

**Implementation and Adoption Consultant:**

**a. Year 1 \$ \_\_\_\_\_**

**b. Year 2 (Optional Renewal)**

\$ \_\_\_\_\_

**c. Year 3 (Optional Renewal)**

\$ \_\_\_\_\_

**d. Year 4 (Optional Renewal)**

\$ \_\_\_\_\_

**e. Year 5 (Optional Renewal)**

\$ \_\_\_\_\_

**5. Other fees not listed (List and detail cost breakdown)**

\$ \_\_\_\_\_

## **APPENDIX J-FORMS**

**RFP #090524MT  
HR Talent Management System**



**STATE OF TENNESSEE  
IRAN DIVESTMENT ACT CERTIFICATION**

<b>SUBJECT CONTRACT NUMBER(S):</b>	
<b>CONTRACTOR LEGAL ENTITY NAME:</b>	
<b>EDISON SUPPLIER IDENTIFICATION NUMBER:</b>	

The Iran Divestment Act, Tenn. Code Ann. § 12-12-101 et. seq. requires a person that attempts to contract with the state, including a contract renewal or assumption, to certify at the time the bid is submitted or the contract is entered into, renewed, or assigned, that the person or the assignee is not identified on a list created pursuant to § 12-12-106.

Currently, the list is available online at the following website:

<https://www.tn.gov/generalservices/procurement/centralprocurement-office--cpo-/library-/public-information-library.html>

The Contractor, identified above, certifies by signature below that it is not included on the list of persons created pursuant to Tenn. Code Ann. § 12-12-106 of the Iran Divestment Act.

---

**CONTRACTOR SIGNATURE**

NOTICE: This certification MUST be signed by an individual with legal capacity to contractually bind the Contractor.

---

**PRINTED NAME AND TITLE OF SIGNATORY**

---

**DATE**

**RFP #090524MT  
HR Talent Management System**



**STATE OF TENNESSEE**

**NON-BOYCOTT OF ISRAEL CERTIFICATION**

The Bidder certifies that it is not currently engaged in, and will not for the duration of the contract engage in, a boycott of Israel as defined by Tenn. Code Ann. § 12-4-119. This provision shall not apply to contracts with a total value of less than two hundred fifty thousand dollars (\$250,000) or to contractors with less than ten (10) employees.

According to the law, a boycott of Israel means engaging in refusals to deal, terminating business activities, or other commercial actions that are intended to limit commercial relations with Israel, or companies doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel to do business, or persons or entities doing business in Israel, when such actions are taken:

- 1) In compliance with, or adherence to, calls for a boycott of Israel, or
- 2) In a manner that discriminates on the basis of nationality, national origin, religion, or other unreasonable basis, and is not based on a valid business reason. Tenn. Code Ann. § 12-4-119.

<b>Signature of Authorized Representative</b>	<b>Date</b>
<b>Printed Name</b>	<b>Phone Number / Email Address</b>

(TO BE SUBMITTED WITH BID)

**RFP #090524MT  
HR Talent Management System**

**CERTIFICATION REGARDING LOBBYING**

**Applicable to Grants, Sub-grants, Cooperative Agreements, and Contracts Exceeding \$100,000 in Federal Funds.**

**Submission of this certification is a prerequisite for making or entering into this transaction and is imposed by section 1352, title 31, U.S. Code. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Any person who fails to file the required certification shall be subject to a civil penalty or not less than \$10,000 and not more than \$100,000 for each such failure.**

**The undersigned certifies, to the best of his or her knowledge and belief that:**

**No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into of cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.**

**If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with the Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.**

**The undersigned shall require that the language of the certification be included in the award documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and that all sub-recipients shall certify and disclose accordingly.**

---

**FNS Grant/Cooperative Agreement**

---

Name/Address of Organization

---

Name/Title of Submitting Official

---

Signature

---

Date