

**Charleston County School District
 Request for Proposals
 Human Resources Department
 AMENDMENT 1**

Solicitation Number: P2308

Description: Automated Agreement and Electronic Signature Software Solution

Date: October 7, 2022

SUBMIT OFFER BY: October 28, 2022, BY 2:00 PM

QUESTIONS MUST BE RECEIVED BY: October 5, 2022 by 12:00 PM

NUMBER OF COPIES TO BE SUBMITTED: One (1) Original Copy, Five (5) Hard Copies and One (1) USB Flash Drive (See page 2 for details)

**PROCUREMENT OFFICIAL CONTACT: Procurement Services
 Attention: Debra Coen, NIGP-CPP, CPPO, CPPB
 3999 Bridge View Drive
 North Charleston, SC 29405
 Phone: 843-566-1982
 Email: debra_coen@charleston.k12.sc.us**

The term "Offer" means your "Bid" or "Proposal".

Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior.

You must submit a signed copy of this form with your offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold your offer open for a minimum of ninety (90) calendar days after the Opening date.

Print Name of Offeror (Full legal name of business submitting the offer)		Date Signed
Authorized Signature (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)		Taxpayer Identification No.
Title (Business title of person signing above)		Telephone Number
Printed Name (of person signing above)		Facsimile Number
Company Address (Street, City, State & Zip Code)		
Contact Person(if different than authorized signature)		Email Address
Telephone Number	Facsimile Number	

Cover Page

AWARDS & AMENDMENTS: Awards will be posted at the Physical Address stated above. The award will be posted on or before 11/30/2022. The award, this solicitation, and any amendments will be posted at the following website URL: <https://www.ccsdschools.com/Page/432>

ACKNOWLEDGEMENT OF AMENDMENTS: Offerors: Acknowledges receipt of amendments by indicating amendment number and its date of issue. See “Amendments to Solicitation” in Section II Instructions to Offerors.

Amendment No.	Amendment No.	Amendment No.	Amendment No.	Amendment No.	Amendment No.	Amendment No.
1	2	3	4	5	6	7
Initial	Initial	Initial	Initial	Initial	Initial	Initial

OFFEROR’S TYPE OF ENTITY: See Section VII Signing Your Offer & SWMBE Participation.

Small Women Minority Business Enterprise (Please Check appropriate boxes)

- | | |
|--|--|
| <input type="checkbox"/> MBE – Native American Owned | <input type="checkbox"/> Minority Owned Small Business Certified |
| <input type="checkbox"/> MBE – African American Owned | <input type="checkbox"/> Minority Owned Small Business Non-Certified |
| <input type="checkbox"/> MBE – Asian American Owned | <input type="checkbox"/> HUB Zone Small Business |
| <input type="checkbox"/> MBE – Hispanic Owned | <input type="checkbox"/> Small Business Certified |
| <input type="checkbox"/> Women Owned Small Business Certified | <input type="checkbox"/> Small Business Non-Certified |
| <input type="checkbox"/> Women Owned Small Business Non-Certified | <input type="checkbox"/> Corporation |
| <input type="checkbox"/> Minority Owned Small Business Certified | <input type="checkbox"/> Partnership |
| <input type="checkbox"/> Minority Owned Small Business Non-Certified | <input type="checkbox"/> Sole Proprietor |
| <input type="checkbox"/> Other _____ | |

The District shall receive all bids by **no later than 2:00 P.M. on the date shown on the Cover Page.**
 Important: **Clearly mark the outside of the envelope, box, or package with the following information.**

**Request for Proposal #P2308
 Automated Agreement and Electronic Signature Software Solution**

Proposals should be sent via United States Postal Service/hand delivered or courier service to:

**Procurement Services
 Attn: Debra Coen
 3999 Bridge View Drive
 North Charleston, SC 29405**

NUMBER OF COPIES TO BE SUBMITTED: When submitting your proposal provide, one (1) Original hard copy, five (5) hard copies of original, one (1) flash drive electronic copy with original and redacted document. The redacted document will be used for FOIA purposes. The redacted document should not disclose any confidential or company trade secrets & etc.

The above numbered Request for Proposals is amended as set forth below.

Reference and acknowledge this Addendum on the offer submitted. Failure to acknowledge addendum may result in rejection of your offer.

If by virtue of this addendum you desire to change an offer already submitted, such change may be made by submitting an amended bid prior to the closing date and hour specified.

AMENDMENTS TO SOLICITATION

(a) The Solicitation may be amended at any time prior to opening. All actual and prospective Offerors should monitor the following web site for the issuance of Amendments: <https://www.ccsdschools.com/Page/432>

(b) Offerors shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment.

(c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

Clauses have been added for demonstrations. Insert on page 18.

Two sets of evaluation criteria are included in this RFP. Each proposal received will be evaluated against the Phase I set of criteria indicated below which does not include the demonstration of product capability. Each offeror required to provide a demonstration of product technical capability will be evaluated against the Phase II set of criteria indicated below. The Phase II Demonstration of Product Technical Capability includes the demonstration only.

EVALUATION FACTORS – PROPOSALS (List in order of importance) Following receipt of proposals from all interested persons and firms, proposals shall be reviewed by a District Selection Committee. The proposals that meet the stated qualifications and submission requirements shall be ranked utilizing the stated evaluation criteria (see below). Once an initial ranking of all proposals has been conducted, the District may elect to award to the top ranked firm or conduct interviews with the three highest ranked firms. If the Selection Committee elects to interview the top ranked firms, a list of firms selected for interview shall be sent to all firms that submitted a proposal.

	EVALUATION FACTORS	POINTS
1	Methodology/Operations	50%
2	Company Qualifications and Experience	30%
3	Price	10%
4	Implementation Plan	10%
	TOTAL POINTS	100%

Phase I

After the evaluation of the Phase I criterion, the criteria scores will be calculated and the average score will not exceed 100 (one hundred) points. The three highest ranked responsive and responsible Offerors after the Phase I evaluation will be asked to provide a demonstration of their proposed system and will be evaluated in Phase II. Scores from Phase I and Phase II will be added together to determine the highest ranked proposal. If only one offeror has been determined to be the only offer that is mathematically capable of receiving the award then the demonstration will be evaluated on a pass/fail basis.

Phase II

Demonstration: 25 Points

Demonstration of the product technical capabilities of the proposed solution to meet the needs of CCSD as defined in this RFP.

DEMONSTRATION REQUIREMENTS

The responsible and responsive offerors with a mathematical possibility of being one of the three highest ranked Offerors after the Phase I evaluations will be required to give an in person or online demonstration of their proposal to clarify or verify the contents and the representations made therein. Demonstrations given by an Offeror under this section are permitted and communication by the Offeror with CCSD or its employees during a demonstration will not violate the restrictions applicable to Offerors.

CCSD will notify Offerors as quickly as possible after the Phase I scoring to schedule specific dates and times.

The demonstration outline noted below will be used to assist the committee in reviewing your response and to gauge how well your product meets their goals and objectives. The time allotted per individual Offeror shall not exceed one and a half (1 1/2) hours.

- a. The activities of the Offeror should be limited to a demonstration of the system described in the Offeror's written proposal. Evaluators may ask questions pertaining to the Offeror's demonstration. The Offeror's answers are restricted to statements of facts. Offerors will not be allowed or permitted to introduce new information. Negotiation is not permitted at this stage in the procurement process and an Offeror may not change its proposal.
- b. The Offeror may be required to document an answer if such a written clarification is determined to be in the best interest of CCSD.
- c. The demonstration should be conducted in a straightforward manner in order to secure a clear and meaningful understanding of the Offeror's proposed system.
- d. The demonstration is designed to satisfy the evaluation panel's need for clarification and understanding of the information that was provided in the Offeror's written proposal. Therefore, the Offeror may not ask questions, divulge any cost information, nor receive preliminary assessments on its proposal from the members of the panel.

A timely demonstration of the service is required. The demonstration is limited to consisting of a brief introduction; system overview; performance capabilities demonstration and question and answer period. Prospective vendors are expected to demonstrate at minimum the following:

- ✓ The functionality of the service to include, but not limited to the functional requirements as listed in the scope of work.
- ✓ All key features of the Automated Agreement and Electronic Signature system proposed.

Questions received are addressed below:

1. Do you have an idea of how many envelopes you'll create per year? (An envelope is a set of PDFs that need to be signed by any number of people) If there is a minimum you can commit to, then we can get bulk discounts for that usage. These envelopes are often use it or lose it on an annual basis ***If they're talking about specific documents per person, there would be Certified Contracts (approximately 15 different types of contracts) sent to approx. 4000 employees; Non-Certified Contracts (approximately 5 different types of contracts) sent to approx. 3000 employees. Additionally, offer letters (4 types) and contracts would be sent to new hires and transfers (roughly 1000+ annually).**
2. Are you inclined to use a commercial off the shelf solution if not all of the features are met or do you think you need all the requirements and building a custom solution is acceptable to you? **The solution must meet all of the requirements listed in the RFP. We are not opposed to a custom solution.**
3. Do you mind clarifying which features are must have vs nice to have?
Mandatory requirements use the terms must or shall. Please refer to the scope of work starting on page 19.
4. When you say "customizable workflows as needed for different members of HR staff.". Can you share some one or two examples of a workflow? **(1)Contract A is initiated by HR Systems, Employee is notified, Employee signs and accepts, Supervisor is notified and HR notified (2) Contract A is initiated by HR Systems, HR Specialist reviews and confirms contract, Employee is notified, Employee signs and accepts, Supervisor is notified and HR notified**
5. What is your expected due date for when this system should be active? Is starting you off a commercial off the shelf solution while building the custom solution in the background acceptable to you? **System must be up and running no later than March 1st, 2023.**
6. Do you really need formulas? Would the excel language of formulas work for you? **Yes**
7. "Must be able to provide different levels of permissions for tracking of signed documents." **Users have different levels of access. Some principals and users need access to multiple locations in additional to their assigned location in our payroll system.**
8. What is your target price/budget in mind? That would guide our unit economics so we can at least rule out solutions too expensive for you.
We do not have a targeted budget.
9. Are you looking to host the solution yourself or is it okay for us to use public clouds? For example, some IT departments require the systems to not have internet access. **CCSD is open to Cloud-Based solutions**
10. Do you need us to build on GovCloud or any publicly available cloud is acceptable? **Any Tier 1 Cloud provider will be acceptable**
11. You mentioned you want SSO. What SSO installation do you have currently? Okta?
ORY? LDAP? **CCSD uses Active Directory which is federated with Google. Our current SSO is a product called Identity Automation.**