

**YOUNGSTOWN STATE UNIVERSITY
REQUEST FOR PROPOSAL**

Date Issued: December 09, 2020

Due Date/Time: January 14, 2021 2:00 PM

RFP#21-120920 – YSU Talent Management System

Youngstown State University (YSU) is seeking software suppliers, in accordance with the terms, conditions and requirements set forth in this Request for Proposal (RFP).

Proposals must be received by the due date/time specified above at the location below. Proposals received after the due date/time may be returned unopened to the Vendor.

Sign and deliver proposal, cover sheet, and schedules to:

Procurement Services
Youngstown State University
One University Plaza
Youngstown, Ohio 44555
Phone: 330-941-3117
Attention: David McCracken
Email: procure@ysu.edu
No Fax or Email Bids Permitted

Envelopes must be sealed and designated- RFP#21-120920 – YSU Talent Management System

Note:

1. No public proposal opening will be held due to the complexity of responses and need for committee review.
2. Completed proposal packages need to be received via a packet that includes an original printed hard copy and a flash drive. Emailed copies are not acceptable.

By signing this document I am agreeing, on behalf of my firm, to the RFP instructions and terms.

Submitted by: Company _____

Authorized Signature _____

Name _____
(Printed Name) (Title) (Date)

RFP Timeline and Schedule

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- RFP ISSUED: December 9, 2020
- NOTIFICATION OF INTENT TO BID: December 15, 2020 by 2:00 PM EST (Send email to procure@ysu.edu)
- RFP QUESTIONS DUE: December 18, 2020 by 2:00 PM EST
- RESPONSES TO QUESTIONS: December 23, 2020 by 2:00 PM EST
- RFP CLOSING DATE: January 14, 2020 by 2:00 PM EST
- PRESENTATIONS for FINAL SELECTEES: Weeks of January 19 and January 25, 2020
- SELECT VENDORS/NEGOTIATE CONTRACT: February, 2021

About YSU

YSU, an urban research University, emphasizes a creative, integrated approach to education, scholarship, and service. YSU places students at its center; leads in the discovery, dissemination, and application of knowledge; advances civic, scientific, and technological development; and fosters collaboration to enrich the region and the world.

YSU consists of the College of Graduate Studies and six undergraduate colleges: the Williamson College of Business Administration; the Beeghly College of Education; the College of Creative Arts & Communication; the Bitonte College of Health and Human Services; the College of Liberal Arts and Social Sciences; and the College of Science, Technology, Engineering, and Mathematics. Degrees offered include associate, bachelors, masters, and doctorate.

YSU is located on a 145-acre campus near downtown Youngstown, Ohio and is equidistant (approximately 60 miles) from both Pittsburgh and Cleveland. Fall 2018 enrollment was 12,731. More information about YSU is available online at [Youngstown State University](http://www.youngstownstate.edu).

RFP Background

This Request for Proposal (RFP) is issued by the Youngstown State University to obtain supplier proposals for a YSU talent management system, which integrates our Human Resources team with all campus departments to hire new talent, manage existing talent, and maintain talent records for our employees.

SECTION I Definitions

Relative to this document, and any addenda incorporated therein, the following definitions apply.

Addendum: A written instrument, issued solely by YSU that details amendments, changes or clarifications to the specifications and terms and conditions of this RFP. Such written instrument shall be the sole method employed by YSU to amend, change or clarify this RFP, and any claims (from whatever source) that verbal amendments, changes or clarifications have been made shall be summarily rejected by YSU.

Agreement, Contract or Purchase Order: Award resulting from the RFP or Request for Quotation.

Bidder, Vendor, Awardee, Supplier: Respondent to the RFP or Request for Quotation.

May, Should: Indicates something that is requested but not mandatory. If the Vendor fails to provide requested information, YSU may, at its sole option, either request that the Vendor provide the information or evaluate the proposal without the information.

Proposal, Quotation: Response provided by Vendor.

Proposal Closing Date: The date and time specified in this RFP by which the quotation or proposal must be received by YSU Procurement Services in accordance with Section II of this RFP. Proposals received after such date and time may not be considered.

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RFP: Request for Proposal.

Shall, Must, Will: This indicates a mandatory requirement. Failure to meet mandatory requirements may invalidate the proposal, or result in rejection of a proposal or quotation as non-responsive.

SECTION II YSU Standard RFP Instructions and Agreement Terms

Vendors are cautioned to read this entire document carefully and to prepare and submit their response providing all requested information in accordance with the terms and conditions set forth herein. To be considered, vendors must submit a complete response to this RFP in the format detailed by the specifications. Proposals must be dated, signed by an official authorized to bind the Vendor to the terms of the proposal and submitted to YSU in accordance with the instructions, terms and conditions of this RFP.

Youngstown State University reserves the right to:

- Accept or reject any or all proposals, or any part thereof, or to withhold the award and to waive, or decline to waive, irregularities in any proposal when determined that it is in its best interest to do so;
- Hold all proposals for a period of up to ninety (90) days after the opening date and to accept a proposal not withdrawn before the scheduled proposal opening date;
- Waive any informality or technicality contained in any proposal received;
- Waive any minor or major defect in the proposal;
- Conduct discussions with respondents and accept revisions of proposals after the closing date;
- Make an award based upon various selection criteria;
- Request clarification from any Vendor on any or all aspects of its proposal;
- Cancel and/or reissue this RFP at any time;
- Retain all proposals submitted in response to this RFP;
- Invite some, all, or none of the Vendor(s) for interviews, demonstrations, presentations and further discussion;
- Negotiate a possible contract and potentially solicit "best and final offers" from some or all respondents prior to or during this negotiation process;
- Award to one, some, or none of the Vendors who submit proposals.

Proposals received after the time for closing may be considered invalid.

Apart from the contact required for any on-going business at YSU, Vendors are specifically prohibited from contacting any individual at, or associated with, YSU regarding this RFP. Vendor communication shall be limited to the contact named on the cover page of this document.

RFP Terms and Instructions:

1. Agreement Extension: YSU reserves the right to extend any agreement resulting from this RFP beyond the normal expiration date if YSU determines it to be in their best interest and the selected Vendor(s) agrees to the extension.
2. Assignment: Any agreements entered into as a result of this offering may not be assigned by the selected Vendor without the expressed written consent of YSU and the participating members.

Compliance: Vendor warrants that both in submission of its proposal and performance of any resultant purchase order or contract, Vendor will comply with all applicable Federal, state, and local laws, regulations, rules, and/or ordinances.

3. Confidential Information: Any and all information, the release of which is prohibited by state or federal law or regulation, including but not limited to the protections of the Family Educational Rights and Privacy Act (FERPA), and the Gramm Leach Bliley Act (GLBA) constitutes Confidential Information. Vendor agrees to hold the Confidential Information in strictest confidence. Vendor shall not use or disclose Confidential Information received from or on behalf of University or any of its students, faculty,

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or staff except as permitted or required by contract or by law, or as otherwise agreed to in writing by University. Vendor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentiality, integrity, and availability of all electronically maintained or transmitted Confidential Information. Service Organization Control (SOC) Audit reports must be available if applicable to this event. Vendor shall abide by the Privacy and Security Rules as set forth by the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

4. **Conflicts of Interest and Ethics Compliance:** No personnel of Vendor or member of the governing body of any locality or other public official or employee of any such locality in which, or relating to which, the work under this Agreement is being carried out, and who exercise any functions or responsibilities in connection with the review or approval of this Agreement or carrying out of any such work, shall, prior to the completion of said work, voluntarily acquire any personal interest, direct or indirect, which is incompatible or in conflict with the discharge and fulfillment of his or her functions and responsibilities with respect to the carrying out of said work. Any such person who acquires an incompatible or conflicting personal interest, on or after the effective date of this Agreement, or who involuntarily acquires any such incompatible or conflicting personal interest, shall immediately disclose his or her interest to YSU in writing. Thereafter, he or she shall not participate in any action affecting the work under this Agreement, unless YSU shall determine in its sole discretion that, in the light of the personal interest disclosed, his or her participation in any action would not be contrary to the public interest.
5. **Ethical Conduct:** It is expected that once an agreement is issued, Vendors (awarded or not awarded) will not undertake any actions that might interfere with, or be detrimental to, the contractual obligations of YSU. YSU reserves the right to take any and all actions deemed appropriate in response to unethical conduct by a Vendor. Such actions include, but are not limited to, establishing guidelines for campus visits by a Vendor, and/or removal of a Vendor from YSU's Vendor's list(s).
6. **Contact:** Apart from the contact required for any on-going business at YSU, Vendors are specifically prohibited from contacting any individual at, or associated with YSU regarding this RFP. Vendor communication shall be limited to the contact named in this RFP document. A Vendor's failure to adhere to this prohibition may, at YSU's sole discretion, disqualify the Vendor's proposal.
7. **Evaluation:** If an award is made, the Vendor(s) whose proposal, in the sole opinion of YSU, represents the best overall value to YSU will be selected.
8. **Findings for Recovery (Ohio Revised Code Section 9.24):** Ohio Revised Code (O.R.C.) Section 9.24, prohibits the State from awarding a contract to any Vendor against whom the Auditor of State has issued a finding for recovery if the finding for recovery is "unresolved" at the time of award. By submitting a proposal, Vendor warrants that it is not now, and will not become subject to an "unresolved" finding for recovery under O.R.C. 9.24, prior to the award of any contract arising out of this RFP, without notifying YSU of such finding.
9. **Hold Harmless:** It is understood that the Vendor, if awarded an Agreement agrees to protect, defend, indemnify, and save harmless YSU from any claims suits or demands for payment that may be brought against it due to the acts errors or omissions of Vendor in providing the services under this agreement..
10. **Incurred Expenses:** The Vendor, by submitting a proposal, agrees that any costs incurred by responding to this RFP or in support of activities associated with this RFP shall be the Vendor's sole responsibility and may not be billed to YSU. YSU will incur no obligation of liability whatsoever to anyone resulting from issuance of, or activities pertaining to this RFP.
11. **Minimum Insurance Coverage's and Requirements:**

The selected Vendor(s) shall obtain and maintain the minimum insurance coverage's set forth below. By requiring such minimum insurance, YSU shall not be deemed or construed to have assessed the risk that may be applicable to the selected Vendor(s). The selected Vendor(s) shall assess its own risks and, if it deems appropriate and/or prudent, maintain higher limits and/or broader coverages.

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The selected Vendor(s) is not relieved of any liability or other obligations assumed or pursuant to the contract by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types.

Coverages:

- A. Commercial General Liability: ISO form CG0001 or its equivalent. Coverage to include:
- Premises and Operations
 - Personal Injury/Advertising Injury
 - Products/Completed Operations
 - Liability assumed under an Insured Contract (including tort liability of another assumed in a business contract)
 - Independent Contractors

Limits Required: The selected Vendor(s) shall carry the following limits of liability: [Minimum Insurance Requirements](#).

Additional Requirements:

Commercial General Liability (CGL) must include coverage for liability arising from products-completed operations and liability assumed under an insured contract.

If the CGL insurance has a general aggregate limit, then ISO endorsement CG2504 (03/97 Edition) or its equivalent must be added. The Designated Location(s) General Aggregate Limit must be maintained for the duration of the agreement, and the limit must be twice the minimum required occurrence limit.

The selected Vendor(s) shall name YSU and its Board of Trustees, officers, employees, agents, and volunteers as Additional Insured's on ISO endorsement CG 2026 or its equivalent.

The CGL policy shall contain no endorsement or modification limiting the scope of coverage for liability assumed under a contract or liability arising from pollution.

All Policies:

- Must be written on a primary basis, non-contributory with any other insurance coverage's and/or self-insurance carried by YSU.
- Must include a Waiver of Subrogation Clause.
- May not be non-renewed, cancelled, or materially changed or altered unless thirty (30) days advance written notice via certified mail is provided to YSU.

12. Non-Discrimination: In submitting their proposal, or performing that which results from an award by YSU, the successful Vendor agrees not to discriminate against any employee or applicant for employment with respect to hire, tenure, terms, conditions or privileges of employment or any matter directly or indirectly related to employment because of race, color, creed, religion, sexual orientation, national origin, sex, age, handicap or Vietnam era veteran status. The successful Vendor further agrees that every sub-contract for parts and/or service for any ensuing order will contain a provision requiring non-discrimination in employment as specified above. This covenant is required pursuant to Executive Order 11246, Laws and Regulations of the State of Ohio. Any breach thereof may be regarded as material breach of contract or purchase order.

13. Prohibition of Offshore Outsourcing: The Vendor affirms to have read and understands Executive Order 2011-12K and shall abide by those requirements in the performance of this Contract, and shall perform no services required under this Contract outside of the United States.

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[Governor's Executive Order 2011-12K](#)

The Vendor also affirms, understands, and agrees to immediately notify YSU of any change or shift in the location(s) of services performed by the Vendor or its sub-contractors under this Contract, and no services shall be changed or shifted to a location(s) that is (are) outside of the United States.

The Vendor also agrees to disclose if requested by YSU all of the following:

- The location where all services under this Contract will be performed by any Vendor;
- The location where any state data associated with any of the services the Vendor is performing under this Contract, or seek to provide will be accessed, tested, maintained, backed-up or stored;
- The principle location of business for any Vendors supplying services under this Contract.

If any Vendor performs services under this contract outside of the United States, the performance of such services shall be treated as a material breach of the contract. YSU is not obligated to pay and shall not pay for such services. If any vendor performs any such services, vendor shall immediately return to YSU all funds paid for those services. YSU may also recover from the vendor all costs associated with any corrective action YSU may undertake, including but not limited to an audit or a risk analysis, as a result of the vendor performing services outside the United States.

YSU may, at any time after the breach, terminate the contract, upon written notice to the vendor. YSU may recover all accounting, administrative, legal and other expenses reasonably necessary for the preparation of the termination of the Contract and costs associated with the acquisition of substitute services from a third party.

If YSU determines that actual and direct damages are uncertain or difficult to ascertain, YSU in its sole discretion may recover a payment of liquidated damages in the amount of two percent of the value of the contract.

YSU in its sole discretion may provide written notice to vendor of a breach and permit the vendor to cure the breach. Such cure period shall be no longer than 21 calendar days. During the cure period, YSU may buy substitute services from a third party and recover from the vendor any costs associated with acquiring those substitute services.

Notwithstanding YSU permitting a period of time to cure the breach or the Vendor's cure of the breach, YSU does not waive any of its rights and remedies provided YSU in this contract, including but not limited to recovery of funds paid for services the Vendor performed outside of the United States, costs associated with corrective action, or liquidated damages.

The vendor will not assign any of its rights, nor delegate any of its duties and responsibilities under this contract, without prior written consent of YSU. Any assignment or delegation not consented to may be deemed void by YSU.

14. Pricing: Vendors are asked to thoroughly explain their pricing structure in their response. YSU reserves the right to negotiate this and other pertinent terms with the selected finalist(s) and this could become one of the selection criteria used in the award process.
15. Proprietary Information: All evaluation criteria for proposals are non-proprietary and subject to public disclosure after contract award. All proposals, except for items reasonably identified by Vendor as trade secrets or proprietary information, are subject to public disclosure under Ohio Revised Code Section 149.43. Vendor shall be solely responsible for protecting its own trade secret or proprietary information, and will be responsible for all costs associated with protecting this information from disclosure.
16. Provisions: If any provisions in the resultant agreement are held to be invalid, void, or unenforceable, the remaining provisions shall nevertheless continue in full force and effect without being impaired or invalidated in any way.

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17. Quality of Service: The successful Vendor(s) must be prepared to furnish continual high quality service to YSU. Failure to do so may be considered just cause for cancellation of the agreement.
18. Right to Set-Off: Upon the occurrence of any default or breach of an Agreement resulting from this RFP by Vendor, University shall have the right to withhold and set-off against any amount otherwise due to be paid to Service Provider, for the amount of any such cost, loss, damage, expense, liability, obligation or claim resulting from Vendor's default or breach of this Agreement. Neither the exercise of, nor the failure to exercise, such right of set-off will constitute an election of remedies or limit University in any manner in the enforcement of any other remedies that may be available to it.
19. Sales Tax: YSU, as an instrumentality of the State of Ohio, is exempt from Ohio sales tax and Federal excise tax, including Federal transportation tax. An exemption certificate will be furnished by YSU upon request.
20. State Law: Any agreement entered into as a result this solicitation will be governed by the laws of the State of Ohio.
21. Use of Data: Vendor agrees that it will keep confidential the features of any technical or proprietary information furnished by YSU and use such items only in the production of items awarded as a result of this inquiry and not otherwise, unless YSU's written consent is first obtained.
22. Contract Term
 - a. The University intends to award multi-year agreements. The length of the agreements will be negotiated by the parties.
 - b. The University maintains the right to terminate this agreement and any additions upon failure of the Vendor to abide by the terms and conditions of the agreement and performance specifications. The University will give sufficient notice to correct all outstanding issues and deficient performance connected to this agreement. If not corrected in the specified time, the University may notify the Vendor, in writing, of the intent to terminate the agreement. The agreement will be terminated sixty (60) days after notification.
 - c. No subcontracting or assignment of agreement without prior written consent and approval of the University.
23. Revisions to RFP
 - a. In the event that it becomes necessary to revise any part of this RFP prior to the assigned return date, revision will be provided by YSU's Procurement Services, or designee, to all respondents involved in the RFP. Changes in the specifications will be provided to all respondents through an addendum made by Procurement Services.
 - b. YSU will be the sole determinant of whether any revisions/addenda should be issued as a result of any question or other matters, and may extend the proposal deadline, if in YSU's judgment such information significantly amends this solicitation, or makes compliance with the original proposed due date impractical.
24. Selection Criteria
 - a. The selection of the successful vendor(s) for this proposal will be determined solely by YSU. All proposals will be reviewed very closely for areas such as, but not limited to the following:
 - 1) Price proposal (is not the sole determining factor in the selection process)
 - 2) Quality of products/services
 - 3) Qualifications and experiences
 - 4) References

SECTION III

RFP Response Instructions

1. RFP Questions: Vendors must submit questions to Procurement Services via email at procure@ysu.edu. All questions must be submitted via email and include **RFP#21-120920 – YSU Talent Management System**. Questions submitted by the deadline will be answered via email and will be sent to all RFP participants.
2. **During the competitive proposal process, up to and including the issuance of an award letter, under no circumstances may a vendor contact other individuals at YSU to discuss any aspect of this inquiry or attempt to influence the process. Failure of a vendor to comply with this protocol may invalidate their proposal response.**
3. Proposal Instructions
 - a. Provide notification of intent to bid via email to procure@ysu.edu no later than December 15, 2020, at 2:00 pm EST.
 - b. Complete the RFP cover sheet (page 1 of this RFP)
 - c. Complete Section IV of this RFP by submitting your responses directly into your proposal.
 - d. Proposal Package Requirements. The following **MUST** be included in the proposal-response package by the proposal due-date/time; failure to do so may invalidate the proposal response:
 - (1) Signed and dated RFP cover sheet.
 - (2) Proposals exactly as specified in this RFP in both hard copy and on a flash drive.
 - (3) Agreement to all terms required within this RFP.

SECTION IV Proposal Requirements

Supplier proposals need to include:

1. A minimum of 5 professional references and contact information (name, title, organization, phone number, email) of at least one individual that could be contacted by YSU regarding their professional experience with your firm.
2. Details regarding your firm:
 - a. What is the background of the firm including size, experience, market position, location and headquarters, and date of founding?
 - b. How long has your organization been in the talent management software industry?
 - c. Provide information regarding the stability of the firm considering the possibility of a multi-year engagement.
3. A draft implementation timeline with milestones and estimated lengths of time for each to be accomplished in Microsoft Excel file format.
4. Cost and timing for:
 - a. Annual recurring costs:
 1. Annual subscription fee/s.
 2. Service Level Agreements associated with subscription, and associated breach thresholds.
 3. Any additional annual or monthly services fees additional to the annual subscription fee/s.
 4. Other.
 - b. Onetime costs:
 1. Implementation fees.
 2. Training fees.
 3. All options that your firm offers, not already a part of the specifications listed below in Section V.
 4. Other.
5. Detailed answers to the following questions:
 - a. **Company:**
 1. What background can you share about your firm?
 2. Where are you located?

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3. Please provide information on the following: whether your company is publicly or privately held; number of customers with implementations; annual revenue; customer retention %.
 4. Is your company profitable?
 5. Has your company experienced any recent mergers or acquisitions?
 6. What differentiates your firm and software from your competitors?
 7. Do you currently have clients in Public Higher Education actively using your implemented solution?
 8. If not in Higher Ed, do you have experience in a public sector environment?
- b. Approach/Customer Service:**
1. Describe your support model in detail for both client and applicants.
 2. Describe your firm's commitment to quality and your philosophy/approach to client services.
 3. Do you have a formal process for seeking client input into product development?
 4. Describe your procedures for monitoring client satisfaction.
 5. Describe your development approach and how it supports quality.
 6. How do issues and request for improvements get escalated? What is your process?
 7. Is your solution simple to use/navigate for multiple users with varying expertise?
 8. Can your processes be easily configured/modified as state or internal processes change?
 9. Do you plan to use subcontractors or other partners to fulfill the requirements of this contract? If yes, please list their specific roles and responsibilities. What notice is given to clients when the partner/subcontractor changes?
 10. What is the timeline for critical/severe issues (site is down) vs other problems?
 11. Describe the process by which enhancement requests are handled (how are they evaluated, approved, prioritized, etc.)
- c. Legal:**
1. Does your solution adhere to the laws of the State of Ohio, including Ohio Revised Code and Ohio Administrative Supplement?
 2. Does your solution require any data of any kind to be stored and/or transmitted outside of the United States?
 3. When site links with compliance-oriented data need to be updated, does the company have to do this? Or, is a client administrator able to perform the needed work without opening a request ticket?
 4. Does your site allow for the placement of Clery Act information as needed?
- d. Applicant Tracking System:**
1. Can postings have a status (approval pending, posted, closed/removed from web, failed, filled...) assigned to them?
 2. Can postings be hidden from public view yet accept internal candidates?
 3. Can administrative access to postings be limited to a specific group of individuals?
 4. Does the solution allow reference providers to login and submit a reference form for an applicant? Is this possible without the applicant having the ability to see the reference form?
 5. Does the solution allow reference providers to login and upload a reference letter for an applicant? Is this possible without the applicant having access to the document?
 6. Does the solution allow for different reference forms to be used for different applications?
 7. Does the solution allow different options for when referees are sent the reference form? (e.g. when application completed, when department narrows list to X number of applicants...)
 8. What type of documents can an applicant attach to an application? PDF? DOC? PAGES? Other?
 9. How does the product support general Affirmative Action Plans and applicant reporting for the OFCCP?
 10. How does the product support selection of multiple races/ethnicities by applicants for AFD and OFCCP reports?

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11. What is the maximum applicant attachment upload size?
12. Can administrative users save searches?
13. Does the solution allow for multiple people to simultaneously be hired into one position with one position number?
14. Does the solution allow for multiple people to simultaneously be hired into one position with different position numbers? (e.g. hire candidate 1 into 123456 and 2 into 567890 and 3 into 234455)
15. Does the solution allow applicants to pull information from other websites (LinkedIn, Chronicle for Higher Education...) to auto populate into application?
16. Does the solution allow for custom communication (email, letters, etc.)?
17. Does the solution allow for Background Check integrations to be triggered at different stages of workflows? (e.g. At beginning of Residence Life RA application, but near the end of Staff hiring?)
18. Can an applicant provide job search preferences and receive system notifications when a desired position is posted?
19. Can an applicant save a search?
20. Can applicant profile information be re-used (applicant uses same set of answers/information/references to apply for multiple jobs)?
21. Can an applicant access and apply for jobs via mobile devices?
22. Does the system have interview scheduling capabilities?
23. Does the system have recorded interview capabilities?
24. Can information from previous requisitions be used for new postings of same position?
25. Does the system allow for form templates?
26. Does system allow for customizable forms with standard and custom question banks?
27. Can questions be automatically added to forms and required/not required based on type of position?
28. Can admin users search by application form fields (standard or custom)?
29. Does the system have address checking/verification?
30. Does the system prevent the creation of duplicate accounts?
31. Can applicants search for jobs by department, type of job, skill set, title, campus, etc.?
32. Can admin users search applicants by skills identified?
33. Does the system have a feature for tracking advertising costs and advertising sources?
34. How does the system handle employee transfers, promotions and other employee movement.
35. Does your system send requisition alerts to users to notify them to close filled positions?
36. Is there a way to systematically remove filled positions?
37. Is there a way to systematically remove positions that have not been filled within a specified period of time?
38. Is there a notification to refresh or close requisitions?
39. Does the system automatically post positions to outside job boards? If so, please describe this process and the job boards utilized.

e. Onboarding:

1. Does the solution have an onboarding component?
2. What aspects of onboarding does the solution include?
3. Does the onboarding feature permit admin users to attach custom documents to be shared with the candidate?
4. Is there a reminder communication feature to notify new employees of tasks to complete?
5. How are compliance documents related to your onboarding process (I-9, etc.)?
6. Does the onboarding component permit back and forth communication between the new employee and HR/Academic Personnel?
7. What 3rd party vendors are utilized by the solution for onboarding? If so, list vendors and functionality.
8. Can the onboarding process be customized per employee and/or type of position?
9. Is there integrations with Ellucian Banner for the onboarding process?

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10. Can the system integrate with sources used in the onboarding process, such as equal opportunity training or IT access/setup?
11. What is the onboarding time period? Can the solution handle extended onboarding periods?
- f. Learning Management:
 1. Does the solution support multiple curricula?
 2. If multiple curricula are supported, is there a maximum number?
 3. Does the solution support curricula with professional, state, or federal requirements?
 4. Does the solution support tracking of certifications/licensures earned outside of the system? If so, how?
 5. Does the solution allow for tracking of start and end dates of licensures and to get reports of when a license is about to expire or has expired?
 6. Does the solution allow the importing of existing content from a "home grown" solution?
 7. Does the solution provide a suite of tools for authoring media-rich content?
 8. Does the solution allow for inclusion of podcasts and videos in the curricula?
 9. What are the pedagogical approaches of the product?
 10. What are the average number of clicks users must do to access content? Provide a sample of product design and layout.
 11. What are the options for content authoring? What types of content are allowed?
 12. Does the solution allow drag and drop content authorship?
 13. What options are available for content organization?
 14. How is copyright managed?
 15. What are the options for course exporting?
 16. What are the archival options for the solution?
 17. What communication options are available in the solution? Message through the solution? Are synchronous and asynchronous tools available?
 18. Can files be exchanged within the system? If so, how and describe the security.
 19. What types of sections and groups are allowable? Are sub-groups available?
 20. Is there an e-portfolio?
 21. What discussion tools are available?
 22. Describe the testing and assessment tools available.
 23. Provide information about the course evaluation abilities.
 24. Does the LMS have a calendar? Is the calendar collaborative? Can the calendar be used to schedule student access to materials?
 25. Describe the collaboration options
 26. What learning analytics are available?
 27. Does the product integrate with the campus library resources?
 28. How are prerequisites handled in your LMS?
 29. How is mandatory learning assigned?
 30. Describe the reports available. Can HR create them without IT or vendor involvement?
 31. How does system notification and enrollment alert employees of learning and development activities?
 32. Can employees record skillsets, certifications, etc. that are then searchable by admin users who are looking for employees with certain skill sets?
 33. Will the system be able to communicate with Banner for relevant information such as hire date, position, supervisor, work location, current evaluation status?
 34. Can the system allow for employees to enter items such as certifications earned that are relevant to positions?
 35. Can departments use the system to track and enter data regarding departmental training/certification requirements?
 36. Can courses have an expiration date? Our current job enrichment system has courses expire after 2 or 3 years depending on the phase of the program they are in.
 37. Will there be a portal to track levels of achievement and numbers of awards by date? We currently work on time frames for eligibility of job enrichment increases and lump sum awards. Our apprenticeship program is also on a timed system for requirements.
 38. Can we track awards by date?

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39. Can the LMS track points, hours of learning and potential CEU's?
40. Will there be the capability to track a series of courses and note completion of that series?
41. Can the system track prerequisite courses?
42. Can individuals register for courses through this system?
43. Can registration be set at a minimum or maximum attendance?
44. If this exists how is security assigned? By unit?
45. Will the system allow for registration if prerequisites are not met?
46. Can the system be set up so that HR Staff Development can set up and receive registration for courses that they host and other areas, such as HR Employment, Campus Services or Physical Facilities, set up and monitor their courses?
47. How is security set up to protect information by department or division? For example, we manage the job enrichment system and we do not want others to have access to enter courses for credit or make changes without our knowledge.
48. Is there a way to enter data so that employees see the front facing system and management can enter items that are relevant to operation. We enter awards in the job enrichment system. They do not populate on the employee view until a specific date has passed. This is because if the employee leaves they don't get the award unless the date has passed.
49. Will there be a way to communicate with employees via email? (This would be helpful for informing of awards or missing documentation).
50. Can curriculums be set up in the system by job category or position?
51. Is there an ability to cross list a completed course?
52. Can registration be limited to or by employee (faculty, unclassified or classified staff) or student type?
53. Can we see when employees register and when they cancel?
54. Can attendance be tracked through a tap or swipe of ID card?
55. Can a course be created, scheduled and attendance tracked in one system?
56. Would courses have links to send out information/dates/have on a calendar?

g. Performance Management:

1. Please describe the high value benefits of your performance management solution.
2. Can the system have pre-populated goals that managers can establish at the beginning of the year, and use as a template to populate the reviews for their direct reports? Can you link employee goals to organizational goals?
3. Can a manager assign the same goal to many employees within their chain of command? If yes, please describe.
4. How does a manager stay informed as to the status of a goal or goals for their employees?
5. Describe and provide samples of the reports available that support goals management.
6. Does the solution support multiple categories of employees? (Hourly, salaried, students, professional...)
7. Does the solution support different processes and questions for the different categories?
8. Does the proposed solution allow for commenting by users assigned to a specific person but not necessarily an approver?
9. Does the solution require the collecting of points for employees? Or, can performance management have a non-numeric metric?
10. Does the system provide for 360 feedback?
11. Does the system permit the employee to track and input updates to education or does this need to be done by a manager?
12. Does the solution have the means to handle reviews by more than one supervisor at the same organizational level?
13. Does the solution permit departmental users to search education KSAs and return results of users meeting
14. Does the system support cascading goals?
15. Does the system offer functionality related to faculty reviews such as Faculty 180 or digital measures? Please describe.

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16. Can employees and managers make ongoing notes about performance throughout the year? Describe the process for creating and tracking this type of feedback.
17. Can another employee provide feedback to an employee outside of their reporting hierarchy within your performance management solution? How is this done?
18. Does the system support different categories of feedback and make them accessible to employees and managers? How?
19. Please describe any tools, coaching resources, etc. to support managers in authoring performance appraisals.
20. Does your solution for ongoing performance management provide any reporting capabilities for managers and HR? If so describe what visibility HR will have into the frequency and recurrence of manager-employee performance discussions.

h. Workflow:

1. Does your solution include the use of electronic signatures and electronic signature tracking?
2. Does your solution allow admin users to create new workflows after implementation to meet a new business need?
3. Can admin users edit existing workflows on an adhoc basis?
4. Does the solution allow for distinct workflows for different posting types (salary, hourly, student...)?
5. Does the solution allow for distinct workflows for different talent management paths (hourly, salary, professional...)?
6. Does the solution allow for distinct workflows for different learning management tracks (hourly, professional, salary....)?
7. Can the proposed solution automatically escalate a process to other users or management if an action has not been taken within a predetermined time frame?
8. Does the proposed solution allow for reminders (automated and/or pushed)?
9. Are the reminders configurable by end-user or administrator?
10. Does the proposed solution provide a user with access to a list of all processes that are "in their queue"? If yes, please describe how this is accomplished.
11. Does the proposed solution provide a user with access to a list of all processes that will eventually come to them?
12. Does the proposed solution have the ability to assign an ad-hoc task to a user within the workflow? (Not interrupting the approval workflow.) If this ability is present, can the ad-hoc user respond within the tool?
13. If the solution allows the assigning of tasks to users, are notifications sent to the users?
14. If the solution includes notifications, please provide details on the options for the notifications.
15. If notifications are sent to the users, are they sent in sequence as it is each users "turn" or sent all at once?
16. Does the system allow fluidity in the workflows so that actions can be returned to a user?
17. Are there APIs for other workflow systems?
18. Can the workflow be used with external users such as references?
19. Can the system batch notifications (instead of 10 separate emails, 1 email listing all the things you need to do)?
20. Does the system send an alert if a workflow is not working/stalled?
21. Can workflows be returned to an earlier step due to incorrect information/action? Can this happen at any time in the workflow, even after the workflow has completed?
22. Does the system log approvals, changes, etc. throughout each step of the workflow?
23. Does the solution allow proxy/delegated approvals?
24. Does the tool support electronic signatures?

i. Document Management:

1. Does your solution store all documents electronically?
2. In what format is the information stored? Data? PDF?
3. Is there a limitation for file size for individual document uploads? For overall document storage?

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4. Does your solution provide document templates?
 5. How long does the solution store electronic documents?
 6. Does the system allow for document purges and if so what is the process?
 7. Does the system allow for document purges and if so what is the process?
 8. Does the document management system integrate with other imaging systems, such as Banner document management?
 9. Is the document management solution cloud hosted?
 10. Does the system use OCR to enable searches within documents?
 11. Can users search for documents using a variety of criteria (person identification, document type, dates, etc.)?
 12. Can documents be moved from one record to another/merged into one record?
 13. Can admin users make comments on documents?
- j. Interfaces:**
1. Is there an out of the box predefined interaction with our ERP, Ellucian's Banner? Please describe in detail.
 2. With what other ERP solutions do you have an out of the box pre-defined integration?
 3. How frequently can interfaces run? Pre-scheduled? Ad Hoc? Please describe in detail.
 4. What direction(s) of interface are available? Your solution to ERP? ERP to the solution?
 5. What type are the interfaces? (e.g. a daily batch file of all changes or a live feed?)
 6. What type is used for the data integration? Please provide detail as to the means of the integration.
 7. Please describe how your firm maintains and supports these interfaces as your system and Banner systems are upgraded. Will we be notified if the interface fails?
 8. Please describe what the corporate relationship is between your company and Ellucian.
- k. Dashboards and Reporting:**
1. Does your solution provide YSU with key performance indicators (KPIs) of the performance of tool? Please list these KPIs in detail, including actual numbers, and how they are calculated.
 2. Does your solution provide YSU with standard reporting that does not require customization? If yes, please give a complete list of reports and describe individually their function.
 3. Does your solution provide ad-hoc reporting capabilities without the need for specialized technical knowledge? If yes, please describe these capabilities in detail.
 4. Does your solution provide dashboards with that allow user access restrictions? If yes, please provide screenshots and descriptions of typical dashboard configurations
 5. Does your system support creation of program-wide reports, as well as specific narrow reports?
 6. Does the reporting system recognize the role security setup in the system?
 7. Can reports be scheduled for automatic email delivery to users (e.g., the first day of each month, every Monday at 8:00 AM)?
 8. Can reports be prevented from sending PII via email or email attachment?
 9. Can dashboard reports roll up to VP users (combine dashboards to show several areas that report to VP)?
 10. Can other business office users run reports?
 11. Can the proposed solution be configured by the user to produce exception based reports?
 12. Describe how the system provides the ability to report on skills inventories.
 13. How can data from your recruiting system be leveraged in succession planning for internal sourcing activities/reporting?
 14. Can the system feed other reporting tools such as Oracle Business Intelligence?
- l. IT:**
1. Does your system allow multiple in house administrators?
 2. Are upgrades/new features included in the initial pricing or would they be extra?
 3. Does your system require the installation of any 3rd party software other than an Internet browser to function?
 4. Does your system work on both Windows and Mac platforms?

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5. Does the system work on mobile devices? If the entire system (user and administrator) is not mobile, please provide detailed information.
6. Are the mobile sites miniature versions of the desktop site or are they mobile responsive?
7. What is the uptime percentage of your system over the past 12 months?
8. Please describe how you integrate with other systems (Open API, Web Services, etc.). Please provide details. Do you have any out of the box integrations with other vendors/products?
9. How often is your software upgraded? Are upgrades something you handle, or is that a customer's responsibility?
10. How often is maintenance performed and how are customers notified?
11. When the software is updated, will the update be provided first in a test environment?
12. If the update is provided in a test environment, how much time is provided to the customer for testing?
13. If the update is provided in a test environment, what documentation of the changes is provided to the customer at the time of testing?
14. Is there the possibility of a training environment and what is that cost? How often is the environment updated?
15. Please describe the skill sets necessary to support the system? What does a typical customer team look like (implementation and support)? Are programming skills necessary?
16. How does the introduction of new customers affect the set up for already established customers?
17. Please describe typical tasks that administrators can complete without contacting the vendor for support.
18. Is there a limit to the number of activities (requests, evaluations, curricula...) that can be managed in the solution without affecting performance?
19. What is your development cycle? What is the typical timeframe for development requests?
20. Is there a different development cycle for fixes vs enhancements?
21. Please describe your change management philosophy.
22. What are your data retention policies? Please describe in detail.

m. Implementation:

1. How long does a typical implementation take?
2. Please provide an implementation plan for your proposal from conception to implementation for each product. Please include a GANTT chart with durations to the week level.
3. What is your process for implementing software updates?
4. When would you be available to start the project?
5. What resources are provided during implementation?
6. What is the amount of development hours that come with the agreement?
7. Is there a dedicated team including a project manager assigned to the institution during implementation?
8. Starting from the awarding of the contract, please include a complete implementation timeline detailing all required actions by both vendor and stores to successfully facilitate system installation.
9. Explain who at your firm is responsible for installation and implementation of the various components of the system. Be specific with titles and names and product types.
10. What type of support is provided during implementation?
11. What type of support is provided post-implementation?

n. Training:

1. Please describe how YSU personnel will be trained on new processes and technology.
2. What type of resources do you provide for training?
3. Once implementation and initial training is completed how are new employees trained on the system?
4. Is training on-site or remote? If on-site, where is location?

5. What training documentation is provided? Will there be assistance in creating documentation for our users?
6. Describe in detail the user training that your firm provides prior to installation and startup. Include details regarding preferred training methods, time required for each module, and training locations.
7. Does your firm have a process for retraining after the initial installation period? If a follow up session is not part of your standard training package, provide details as to how your firm ensures that our retail operations are using the system to its fullest capacity.
8. Attach a schedule of application post installation, professional development, software training fees both on site at Youngstown State University and at your training facility.

SECTION V
Specification Requirements

1. Assumptions about the Existing Technology Environment

- a. The current Banner environment consists of:
 - i. One high-end Bare metal DB Server in ORACLE Cloud supporting:
 1. ORACLE Linux Version 6.0, database version 12.2.0.1.180717
 2. Banner Administrative Suite Version 9 including: General, Finance, Advancement, Accounts Receivable, Student, Financial Aid, Human Resources, Position Control, Luminis, Banner Document Management and ODS
 3. Information Builders WebFOCUS for reporting
 4. Database Oracle 12c
 - ii. Existing interface between PeopleAdmin and Banner
 - iii. Centralized and distributed printing environment.
 - iv. PC compatible workstations primarily running Windows 10 and MacOS
 - v. The most common Office desktop suite of products is Microsoft Office and the University has standardized on Office 2016 for the desktop, but flavors of Microsoft Office for Macintosh do exist.
 - vi. A high-speed switched-Ethernet backbone network environment connects the campus.
- b. Third party vendors:
 - i. HERC; Higher Education Recruitment Consortium
 - ii. Interface for talent mgmt. with Banner
- c. The above environment is described for informational purposes. The vendor should not limit their proposal because of current hardware and software. The solution should not be limited to these available systems but the vendor should recommend the architecture that is best for its proposed solution. Detailed information about particular systems is available on request.
- d. All buildings and workstations on Campus have Internet access.
- e. The University has existing Internet connections and a Web site.

2. Technical Requirements

- a. **Accessibility:**

1. Are you, as a vendor, able to agree or indicate willingness to agree to correct identified accessibility issues in an appropriate time frame if found?
2. Please provide a WCAG 2.0 VPAT. Please note - a VPAT should be completed for each user interface type (admin vs end user if features and interface is different)
3. If your product does not meet the WCAG 2.0 level AA standard, do you have a product road map for accessibility going forward? If so, please provide. (include a general outline: goals, milestones including dates.)
4. Do you do testing with users with disabilities?
5. Does your company have a policy or commitment statement regarding accessibility? If so, please provide.
6. How will you help ensure the on-going accessibility, tracking and updates, of your products and services after they have launched or been deployed, and in the future (enhancements or upgrades)?
7. If your product is not accessible, how will you provide Equally Effective Alternative Access so that everyone can use your product?

b. Access, Provisioning, Authentication, Authorization and Security:

1. Describe the authentication methods and protocols you support and outline any additional costs required to implement them
2. Describe the method(s) available to create, maintain, and delete accounts including roles/permissions. In particular, outline methods, APIs, etc. used to automate the creation, maintenance, and deletion of account information. Document any additional costs required to implement these methods.
3. Will Vendor's Product application recognize single sign-on and authentication from an external source such as Active Directory, LDAP, Kerberos a. If so, how does it work with the Product application? b. If not, describe in detail how Vendor's Product handles this requirement
4. Describe in detail and provide examples as needed, of the various levels of security.
5. Describe in detail how Vendor's Product manages users' roles, rights, and privileges. For example, does the Vendor's application utilize Oracle's user security infrastructure or does it have another means?
6. Vendor's Product should incorporate unique user ID's and passwords for secured access providing flexible and customizable role based security down to field level including graduated levels of access (e.g. read-only, read/write, ODBC access etc.). Vendor's Product must also provide the ability to restrict user access for menu items, screens and fields by group, user or function.
7. Describe the authorization scheme utilized and how roles, groups and privileges are assigned and maintained. If your software allows custom defined roles, groups or privileges, please describe this capability and any additional costs required to implement these custom defined roles.
8. If the application is hosted remotely, specify what access methods Youngstown State University will use to access the application and data.

c. Data:

1. Describe your data archiving and purging capabilities.
 2. Does your database support internationalization? For example, does it support diacritical marks (i.e., Noël, là)?
 3. Please outline supported methods and formats for migrating data into your system during initial setup or out of your system upon contract/application termination. Please outline any additional costs associated with these migration processes.
 4. Describe your backup strategies for content restoration and for disaster recovery. Provide a list of external applications you integrate with and describe how YSU would integrate your application specifically with those applications in our environment. Outline any additional costs or additional software required to implement these integrations.
- d. Integration: Integration should be one way or bidirectional as appropriate.**
1. If applicable, describe your products ability to integrate with or otherwise provide data to a data warehouse system.
 2. Describe any supplemental third-party products your solution requires, supports, integrates with or is dependent upon.
 3. If your systems interacts with or integrates with a Learning Management System, please describe your use of the Learning Tools Interoperability specification, including supported versions, features and limitations.
 4. Vendor's Product must interface with the existing electronic mail system (Office 365)
- e. Ellucian Banner Integration:**
1. Application architecture must include Vendor supported interfaces to access Ellucian database and related database objects to obtain talent information. Vendor must supply these interfaces without requiring additional development or customization by the University.
 2. These interfaces must connect to the database using the credentials of the end-user, not a shared/ proxy.
 3. Vendor must maintain and provide interfaces to its software that are current to the latest supported versions of Banner within 30 days of Ellucian's general release date.
 4. Vendor must maintain these interfaces to Banner and keep them current with changes in Banner, its database, and utilize the requisite Banner Application Program Interfaces (API's) as the Ellucian approved means to access and manipulate the underlying Banner database tables.
 5. Product must provide a thin-client (Web-based) user-interface to the application that is supported on the current version of leading commercially available browsers including the current version of Google Chrome.
 6. Where the Vendor's Product requires a fat-client (PC-based application), it should be limited to only those users who have application administration duties or who are core users.
 7. Describe in detail Vendor's access to Ellucian intellectual property, specifically to Ellucian's approved application program interfaces (APIs) between Banner 8/9 and external third party systems.

8. Describe in detail procedures and processes to synchronize data between Vendor's Product and Banner. Indicate if these are batch import and export processes for bulk loading or if they are real time event driven synchronization processes.
9. Provide details of the processing scripts used and Banner database tables impacted by the batch imports or exports or database synchronization.
10. Provide details on how the Product ensures data integrity during the import and export processes.
11. Describe in detail the means the Vendor has used to certify that the Product application software is compatible with Banner 8 and Banner 9.
12. The University utilizes Luminis 6.0. This is a portal application that provides a Web-based front-end to Banner and a number of administrative information system services. The Vendor's Product must be compatible with the Luminis environment.
13. Has the Vendor developed Luminis channels available to the University to provide this access via Luminis?
14. If so, does the Vendor's application support single sign-on via the Luminis channel?
 1. If not, by what means does the Vendor's application authenticate the user?
 2. What are future plans, including timeframes, for integration with Luminis or other portals?

f. Miscellaneous Technical Requirements:

1. Describe in detail how Vendor plans to import, convert and/or interface with the University's systems and scheduling data into the Vendor's Product.
2. Describe in detail what tools exist in Vendor's Product application software to compare data in the Vendor's Product with the existing University systems and how the differences are reconciled.
3. Describe in detail how flexible the Vendor's Product is in scaling to accommodate growth
4. Vendor must state whether Vendor's Product contains any open source software or is subject to any third party license restrictions. If so, provide details as to the name of the software, the Licensor and describe how it is integrated into Vendor's Product.

g. Security:

1. How is YSU data protected from intentional or accidental exposure or change during transmission within the local network or internet? What encryption algorithm(s) is (are) used?
2. Describe how your product protects the privacy and confidentiality of student records as outlined in FERPA, HIPAA, etc.
3. How is application activity recorded for use in auditing activities?
4. What information is recorded in the logs?
5. Are audit logs centrally stored and retained? What is the retention period of those logs and how are they protected?

6. Describe the process for recognizing, reporting, and responding to unauthorized attempts to access the system and/or data.
7. Do you have breach notification/incident reporting procedures? If so, describe.
8. When a critical security issue is discovered in your product, what is your process and cycle (i.e. quarterly) for remediating it?
9. Are your applications scanned for vulnerabilities prior to a new release?
10. Do you perform periodic vulnerability scans and penetration tests on assets, applications, and systems containing customer data?
11. When a critical security issue is discovered for the underlying operating system used by your product, how long do customers have to wait until that patch is applied to your product?
12. Define the access control roles and what types of controls are applied to employees that will have access to the data?
13. Will our data be in a single tenant or multi-tenant environment?
14. What controls are in place to keep customer systems, applications, and data segregated from other customer assets and inaccessible to other customers or from your internal network?
15. Do you have the capability to recover data for a specific client in the case of a failure or data loss?
16. Describe where the data will be kept. List all locations (i.e. city and datacenter name) where university data will be stored? This should include backup locations also
17. Do any external entities have access to your data processing facilities, systems or applications? If so, do you perform due diligence and monitor the compliance and risk of these external entities in which you engage with?
18. Describe how your organization performs web application security verification testing application technical security controls (i.e., protect against vulnerabilities such as cross-site scripting, SQL injection and so forth). Where possible include references to the OWASP ASVS and OWASP Top 10.
19. What types of internal or external audits, if any, are performed for the data center(s)?
20. Describe exactly how you will protect YSU information. This should include the following: network/infrastructure security, information storage security, physical security of data center/colocation facility, change control and patch management, process for responding to security incidents, backup and disaster recovery, and need-to-know processes.
21. At the completion of the contract, will data be returned to the University? How will data be returned to the university and in what format? How long will university data be available within the system at the completion of the contract? How will the data be destroyed and will it be destroyed at all data locations?

h. Support:

1. Describe your support model including SLAs, contact methods, location, etc.

2. Please describe your user community (i.e., Do you provide a forum for customers to identify and discuss “best practices”?; Do you have a product knowledge base?; Do you have a regular user conference?; Do you have a client website and code-sharing?).
3. Give a description of your support services stating what functions are provided with the standard agreement and what optional support is available at additional cost. Describe the staff (number, minimum credentials, experience) assigned to your support function.

i. Training:

1. If training is needed, is training part of the initial contract? No additional cost?
2. Is the training limited to overall use of the product or will specified areas, features, user profiles, etc. also be covered in detail?
3. Is training provided for all user profiles?
4. If accessible design is available and possible through the technology, does the vendor include how to include accessibility as part of their training?
5. Can training be provided via webinar? If so, YSU requests recording of trainings.
6. Are there any special technology or requirements needed for training that YSU must provide?
7. How many hours of training are provided at no additional cost?