REQUEST FOR PROPOSALS
Atlanta Regional Commission

Metro Atlanta Industry Partnerships
Customer Relationship Management (CRM) Solutions

INTRODUCTION

The Atlanta Regional Commission (ARC) is seeking proposals from contractors that offer Customer Relationship Management (CRM) solutions for business services that could be scaled across metro Atlanta. The Contractor will assist the ARC in implementing a CRM solution, focused on the workforce needs of local employers, in support of Metro Atlanta Industry Partnerships (MAIP), a program administered by ARC and a collaboration between the five Local Workforce Development Boards (LWDB) in metro Atlanta (WorkSource Atlanta, WorkSource Cobb, WorkSource DeKalb, WorkSource Fulton, and WorkSource Atlanta Regional) and Atlanta CareerRise, a part of the United Way of Greater Atlanta. The scope of service for the work is based on an agreed upon set of CRM capabilities developed by metro Atlanta WorkSource Directors and Atlanta CareerRise.

ARC intends to award a contract for planning, installation, training/support, and maintenance of the CRM. It is anticipated that available funds for the initial project phase will not exceed $80,000. At the sole discretion of ARC, this contract may be extended annually for up to three additional years, based on Contractor performance and funding availability. If successful, opportunities for expansion of the CRM both in adding features and increasing the number of individuals it serves may be considered as part of this contract in the future.

APPLICANT ELIGIBILITY

Individuals and organizations, whether for-profit or not-for-profit, having the appropriate experience and specific expertise necessary to carry out the duties and responsibilities outlined herein are eligible. All proposers must have products that meet the specifications and have demonstrated experience in successfully deploying similar projects across a region to be eligible for consideration. Proposers must also have a clear and demonstrated understanding of the of the ARC, the Local Workforce Development Boards, and MAIP and its partners. ARC reserves the right to check all references furnished and consider the responses received in evaluating the proposals.

At a minimum, but not limited to, the selected organization will be required to adhere to the following:

- General Financial Requirements and Assurances
- Required Certificates of Insurance
- Assurance of Compliance with Title VI of the Civil Rights Act of 1964
- Assurance of Compliance with Section 504 of the Rehabilitation Act of 1973, as Amended, and the Americans with Disabilities Act of 1990
- Disclosure of Lobbying Activities Form
- Certifications Regarding Debarment, Suspension and Other Responsibility Matters; Drug-Free Workplace Requirements; and Lobbying

PROPOSAL FORMAT AND CONTENT

Interested organizations should submit a proposal that addresses the business requirements and capabilities desired. The Proposer must provide a detailed breakdown of the proposed budget in the format of Exhibit B. Organizations must respond to this RFP with electronic versions of their proposals in either a PDF file or Microsoft Word compatible word processing format. Proposal evaluation will focus initially on the written proposals.

ARC anticipates that a contract will be awarded by July 2020. All work must be completed and all funding invoiced by June 30, 2021. The successful organization or team of organizations should be prepared to begin work immediately. ARC reserves the right to award all or part of the available funds for this project.

Proposals must include the following information:
1. Legal name of the organization.
2. Point of contact (name, title, phone number, mailing address, and email address) at lead organization.
3. Qualifications and technical competence of the organization(s) in the type of work required.
4. Description of experience on similar projects including a list of at least 3 references within the past 5 years, with current contact information.
5. Listing of key project personnel and their qualifications.
6. Geographic location of the organization's office performing the work.
7. A detailed description of the technical approach proposed for accomplishment of the work.
8. A proposed schedule and work plan for the accomplishment of the work described in this RFP.
9. A proposed project budget in the format at Exhibit B to this RFP.
10. Any other pertinent information.

Proposals shall not exceed a total of 15 pages (8.5 x 11) printed double-sided, inclusive of resumes and organization experience. Covers, end sheets, budget exhibits, and an introductory letter shall not count against this maximum. Font size shall be a minimum of 11 point in all cases.

PROPOSAL EVALUATION

The review of written proposals will be based on the following evaluation criteria, with the relative weights in parentheses:
1. A CRM product that meets the business requirements. (40%)
2. Experience in successfully implementing similar projects on time, on budget and delivering key requirements (Related experience, qualifications, and references of the organization(s) and project staff (30%).
3. Detailed work plan and schedule (20%)
    a. Note: This includes the organization's ability to work with potential users to design, train and support product implementation in the desired timeframe.
4. Detailed proposed budget (10%)

The selected Contractor must have a proven product and track record of implementing the product that meets the following business requirements:
- A proven CRM product with a focus on workforce and business services that can be implemented across a region.
- Ability to install, train and support administrators and users; up to 25 users in the initial implementation.
- Planning and administration including budget tracking and timelines.
- Demonstrated return on investment.
- Working within defined budgets.

In addition to technical and industry skills, the Contractor should possess:
- Technical Savvy
- Strong Customer Focus
- Project Management

PROPOSAL SUBMITTAL

Questions should be submitted in writing to Rob LeBeau no later than 4:00 pm on Friday, May 29, 2020 via email to MetroAtlantaCRM@atlantaregional.org. All questions received, and responses to those questions, will be posted on the ARC website by 4:00 pm on Friday, June 5, 2020.

ARC must receive one (1) hard copy and one (1) copy in digital format (sent to MetroAtlantaCRM@atlantaregional.org), either in Microsoft Word or PDF format, no later than **4:00 pm ET on Friday, June 12, 2020.**

Hard copy proposals must be mailed to the following address: Atlanta Regional Commission, ATTN: Rob LeBeau, 229 Peachtree Street, Suite 100, Atlanta, Georgia 30303. ARC physical offices are closed, but still receiving mail through the United States Postal Service. Please send your hard copy proposal via USPS with a tracking number.

If interviews are necessary, a short-list of organizations will be invited to participate in an interview process with an evaluation committee. ARC will organize a specific interview date and time with those selected organizations.

ARC reserves the right to award this contract based on initial proposals received without formal interviews and to award all or part of this project to one or more organizations.

ARC reserves the right to select for contract or for negotiations a proposal other than that with the lowest cost, to reject any and all proposals or portions of proposals received in response to this RFP or to make no award, to waive or modify any information, irregularity, or inconsistency in proposals received, to request modification to proposals from any or all proposers during the contract review and negotiation, and to negotiate any aspect of the proposal with any proposer and negotiate with more than one proposer at the same time.

CONFLICT OF INTEREST AND CONFIDENTIALITY

ARC is subject to the Georgia Open Records law. All proposals submitted will become public records to be provided upon request. Any information containing trade secrets or proprietary information, as defined by state law, must be marked as confidential to prevent disclosure. Confidential markings must be limited to the protected information. Entire proposals marked confidential will not be honored. Additionally, conflicts of interest are governed by the ARC Standards of Ethical Conduct available here: Standards of Ethical Conduct. Respondents must disclose any potential conflicts of interest that may arise from the provision of services described herein. Such disclosure should include the name of the individual(s) with whom there is a conflict, any relevant facts to the potential conflict, and a description of the internal controls proposed to mitigate any such conflict. ARC's Staff Legal Counsel will determine whether such disclosure presents a potential organizational conflict of interest that should preclude award to the respondent.

Exhibit A: Scope of Work

I. General: The work to be accomplished by the Contractor(s) is in support of the following ARC work program component: 904PA – Workforce Solutions Administration (MAIP)

II. Organizational Background: ARC serves as the lead WorkSource Board and fiscal agent for Metro Atlanta Industry Partnerships (MAIP). The program is funded by a grant from WorkSource Georgia and is a collaboration of Atlanta CareerRise and WorkSource Metro Atlanta (Atlanta, Cobb, DeKalb, Fulton and Atlanta Regional which serves the counties of Cherokee, Clayton, Douglas, Fayette, Gwinnett, Henry, and Rockdale Counties). The initiative engages a large partner network that includes employers and workforce partners including the boards themselves, chambers and economic development groups, and a variety of community providers. MAIP seeks to implement a regional CRM for business services that would allow for sharing and transparency of employer relationships across users and automate frequent business services tasks including, but not limited to: Employer and partner resource needs, hiring and skills development needs, On the Job Training (OJT) and Incumbent Worker Training (IWT) applications, contracts, and other related documentation. This project includes all aspects of planning, coordinating, and executing a targeted CRM solution in support of this effort.

III. Project Background: Historically, the five WorkSource Boards in metro Atlanta operate independent business services activities and maintain separate communication efforts to track related activities. Under the MAIP program, many of these business services activities are coordinated to support a select number of targeted industries. Currently, there is not a regional CRM project in use to support the independent business services activities nor to support the MAIP program. This makes it difficult to track and document key components of business services information in the region and difficult to measure the outcomes of business services efforts. Furthermore, there is not a way for the five area WorkSource Boards or their MAIP partners to share information and document business relationships and workforce efforts, leading to multiple and often disparate efforts. In addition, there is no comprehensive system accessible to the WorkSource Boards and MAIP partners that allows employers to input job opportunities, hiring needs or see where there may be potential partners (WorkSource and MAIP Partners) who could assist with programs and services. The resulting confusion can create situations where multiple organizations are working with the same employer and where employers are experiencing “workforce fatigue” due to numerous organizations contacting them.

The proposed CRM would improve the current state by connecting the five area WorkSource Boards business services representatives and additional regional partners with a system that would allow for transparency, outcomes measurement, and encourage collaboration. The specific desired business outcomes are included below.

General Requirements

- Users are able to upload and store documents.
- Users are able to edit/electronically sign documents that have been scanned into the system.
- Users are able to configure fields and values without coding.
- Data System Integration: Need a single comprehensive system with the capability to connect to multiple databases.
- Mobile system - Can be accessed via desktop, laptop, and smartphone.
- Needs to be a cloud-based, SaaS (Software as a Service) Platform.
- System must be Browser-based and require no hardware to function.
- Ability to communicate with internal staff through messaging type functionality.
- Ability to create groups related to specific industries.

- System must have a web-based login for staff and partners to access the system.
- Preferred system is a modifiable off the shelf solution (MOTS).
- Admins must have the ability to set permissions and access rights based on user roles.

Sector Strategies and Business Engagement

- Automated, trackable workflows for managing interactions with employers including workforce-specific CRM functionality for establishing new employer relationships and maintaining existing relationships including:
  - Individual, role-based reminders for follow up.
  - Individual, role-based dashboards for employer status and required activities.
- Service delivery to employers. Ability to track type, frequency and outcome of services provided to employer partners.
- Repository for job orders developed by contractors. Also, system would ideally serve as a repository for publicly advertised job openings.
- Ability to digitally match individual job-seekers with employment opportunities based on alignment of their individual experience and skills with the requirements of the available positions.
- Automated referral of staff to the appropriate employer for further screening and consideration.
- Management of campaigns and other outbound mass messaging.
- Operational reporting (dashboard) on Business Services activities.
- Ability to integrate with partner agencies to exchange employer data and employer accounts.
- Ability to create company overviews, store employer contact info, record of visits, and what services are being offered.
- Ability to create business hierarchy for businesses that have multiple locations within Atlanta.
- Ability to do business assessment as a survey or questionnaire for business services reps when communicating with employers.
- Document employer engagement (e.g., track new contacts/ returning clients/ champions).
- Ability to track communications (phone, email, in-person) with employers.
- Referral system for business services staff for ensuring employer needs are met.
- Track job fairs and outcomes of these events/activities to understand the usefulness and effectiveness of these activities (e.g., capture businesses involved and business attendance).
- Ability to track incentives and services.
- Ability to track NAICS codes related to a business.
- Ability to track trainings, apprenticeships, employment readiness, on the job trainings, etc.

Reporting

- Users are able to export data for reporting functionalities.
- Users are able to share reports with one another.
- Pre-configured business services specific functionality for reporting.
- Reports are in real-time and include data visualization dashboards.
- Ad hoc reporting tools are available to all users.
- Real-time data/reporting capabilities.
- Dashboard with customizable content for different audiences/stakeholders- e.g., core partners, board, management, employers, and staff.
- Creating reports must be user-friendly and can be configured without coding.
- All users must have the ability to create reports.

Partner Portal (with up to 25 users)

- Users are able to share and display information from other partners including referrals between agencies.
- Ability for partner agencies to easily communicate with each other via methods beyond email threads.
- Ability to see which partner is providing which services to an employer, what type of communication has been made, and log emails/calls between the partner and employer.
- Ability to share accounts between agencies while having a master account holder.
- Referral system for core partners and partners outside of system (i.e., community partners).
- Ability to: (1) notify partners of initial referral, (2) log when partner engages with business (3) notify key personnel (4) send reminders/alerts of referrals when necessary
- Ability to give access to community partners (outside of WIOA) to log business referrals
- Email notifications to alert partners that a person has been referred to their program.
- Ability to find information and provide seamless referrals to in-demand industry and occupational training certificate providers and apprenticeship programs.

Employer facing portal (optional but desired)

- User-friendly employer interface.
- Employer portal where employers can easily post or link to their job posts, track candidates, search resumes, connect with business services staff, see upcoming events, and find/connect training providers in their industry.
- The employer portal must enable employers to do the following:
  - Create, update, post, and manage employer information;
    - If the employer forgets their username and/or password, the System should prevent them from creating another account and should offer to e-mail the employer their username and/or Password;
  - Post job openings in a user-friendly method;
  - Select the fields of information to be disclosed to the public;
    - Require employers to have an active job order posted to conduct a candidate search or screening;
    - Use searching, screening, and ranking tools to quickly focus on the candidates that meet their needs;
    - The employer and job order information must be forwarded to authorized staff for review and approval prior to its public posting.
    - Users are able to manage different user roles and access rights.
- The System must have employer contact management capabilities, including but not limited to, maintaining a list of businesses, profile data, their contacts and representatives, reduction in force data, and a contact history log to record interactions.
- The System must provide authorized staff the ability to access all employer records to provide assistance and monitoring.

IV. Work Tasks

The Contractor shall perform all the necessary services to include the following deliverables below. The workload percentages are projected targets for work effort and not specifically percent of budget expenditures.

Deliverable	Projected workload percentage
Kick-Off Meeting and Planning	30
CRM Implementation	40
Training and User Support During and Post Implementation	10
System Improvement Based on User Experience	10
System Maintenance and Updates	10

The work to be accomplished under this proposed contract is divided into five tasks, as described below.

<u>Task 1a- Kick-off Meeting and Regular Progress Meetings</u>
The Contractor will hold a kick-off meeting at MAIP offices to introduce the individuals and organizations involved, discuss the scope of work, co-plan the process to complete the work within the required timeframe, and clarify the roles and expectations of all involved. Monthly progress meetings will be held between the Contractor and MAIP (in person or electronic)

<u>Task 1b - Planning</u>
This includes working with project leaders and users to discuss system functionality, user needs, and review system options to ensure the system meets the goal of the project and user needs.

<u>Task 2 - Implementation</u>
Working with the project leadership and users, the Contractor will lead the CRM development and implementation to meet the desired requirements.

<u>Task 3 - Training and User Support During and Post Implementation</u>
The Contractor will train users appropriately as a part of system implementation, providing adequate support throughout the process and post implementation to ensure success.

<u>Task 4 – System Improvement Based on User Experience</u>
The Contractor will continue to make improvements to the system based on user experience post implementation based on user feedback and in partnership with project leadership.

<u>Task 5 – System Maintenance and Updates</u>
The contractor will continue to maintain the systems as agreed upon ensuring routine maintenance and updates occur in a timely manner.

EXHIBIT B: Proposed Project Budget

Provide a detail budget listing all expected costs as they relate to the tasks listed below and project labor costs.

A. Task Focused Budget

Task 1: Kick-Off & Planning $__________________

Task 2: Implementation
(Including software licenses, annual fees, etc.) $__________________

Task 3: Training and User Support $__________________

Task 4: System Improvements $__________________

Task 5: System Updates and Maintenance $__________________

Total Cost: $__________________

B: Labor Focused Budget

1. **Direct Labor**
   Estimated Hours and Rate/Hour
   Total Estimated Cost (List by position all professional personnel participating in project, including rates)
   Total Direct Labor $__________

2. **Overhead Cost**
   (OMB circulators A-87 and A-122) (Overhead percentage rate) X (Total Direct Labor)
   Total Overhead $__________

3. **Other Direct Costs**
   (List other items and basis for computing cost for each. Examples include collateral, printing, etc.)
   Total Other Direct Costs $__________

4. **Subcontracts (**For each, list identity, purpose and rate)
   Total Subcontracts $__________

5. **Travel**
   a. Travel by common carrier from/to the ARC offices. (List number of trips and Economy class airfare, plus taxi and shuttle fares, etc.)
   b. Travel by private automobile within ARC area. (List # of days x rate)
   Total Travel $__________

5. **Profit (Percentage rate X basis)**
   Total Profit $__________

6. **Total Estimated Cost and Profit** $__________