



**Procurement Division**  
Public Services Building  
2051 Kaen Road  
Oregon City, OR 97045  
(503) 742-5444 (Office)

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**REQUEST FOR QUOTES (RFQ) #2017-64**

Issue Date: August 17, 2017

Project Name:	Human Resources Business Process Review and Implementation		
Quote Due Date/Time:	September 12, 2:00 PM		
Procurement Analyst:	Patricia Bride	Phone:	(503) 742-5447
		Email:	<a href="mailto:pbride@clackamas.us">pbride@clackamas.us</a>

**SUBMIT QUOTES VIA EMAIL TO [PROCUREMENT@CLACKAMAS.US](mailto:PROCUREMENT@CLACKAMAS.US)  
OR MAIL/HAND DELIVERY TO THE ABOVE ADDRESS**

**PLEASE NOTE: EMAIL SUBMISSIONS SHOULD HAVE  
“HUMAN RESOURCES BUSINESS PROCESS REVIEW AND IMPLEMENTATION” IN  
THE SUBJECT LINE**

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**1. ANNOUNCEMENT AND SPECIAL INFORMATION**

Quoters are required to read, understand, and comply with all information contained within this Request for Quotes (“RFQ”). All quotes are binding upon Quoter for sixty (60) days from the Quote Due Date/Time. Quotes received after the Quote Due Date/Time may not be considered. If authorized in the RFQ and resulting contract, travel and other expense reimbursement will only be reimbursed in accordance with the Clackamas County Travel Reimbursement Policy in effect at the time the expense is incurred. The Policy may be found at [www.clackamas.us/bids/terms.html](http://www.clackamas.us/bids/terms.html).

It will be the responsibility of potential Quoters to refer daily to the Bids and Contract Information Page ([www.clackamas.us/bids/index.html](http://www.clackamas.us/bids/index.html)) to check for any available addenda, response to clarifying questions, cancellations or other information pertaining to this RFQ.

All questions regarding this RFQ are to be directed to the Procurement Analyst named above. Quoters may not communicate with County employees or representatives about the RFQ during the procurement process until the Procurement office has notified Quoters of the selected Quoter. Communication in violation of this restriction may result in rejection of a Quoter.

**2. SCOPE**

The purpose of this RFQ is to retain an experienced firm to provide professional consulting services to review and assess the County’s human resource business processes. See the full Scope of Work outlined below. The County would like services to start as soon as a contract may be finalized. The County has identified a budget of \$50,000.00 for the overall project; however, that budget should not be construed by quoters as the default fee proposal. The County endeavors to obtain the best value it can for the quality and quantity of the work to be provided under the resulting contract.

**Background**

In 1999, in response to the Y2K threat, Clackamas County implemented PeopleSoft Financials and PeopleSoft Human Capital Management (“PS HCM”) software packages. At that time, an opportunity existed for the County to take advantage of the technology and restructure business practices. But due to the rapid implementation timeframe, the outcome reflected mostly past business practices. Clackamas County Department of Human Resources (“HR”) has implemented additional features of the PS HMC suite over the last 18 years. In addition, HR has also implemented Clackamas County’s solution for electronic document storage which includes limited workflow process transactions.

However, as part of customer demand and as part of our strategic planning, HR has the need to research and implement “best” or “better” business practices to prepare for a new Enterprise Resource Planning (“ERP”) software or the continued development of the PS HCM and meet customer service strategic goals.

The County is currently working on combining all current HR policies and ordinances into one usable policy document that is scheduled for fiscal year 17/18. The County is reviewing the current recruitment processes, policies, and practices to modernize and create efficiencies. HR is also starting the discovery process of using PS HCM Profile module to capture employee data such as competencies, education, languages, and other employee data that is not captured today. Despite best efforts, many of our processes still use paper or emailed forms to initiate transactions or request services.

### **Scope of Work**

Today, Clackamas County Department of Human Resources desires to reassess its current human resources business processes. The County is seeking services to:

- Improve HR business practices and make processes more efficient.
- Use professional best practice and legal standards to measure operations as a baseline for recommendations to improve transactions, workflows, and internal controls.
- To limit the amount of redundant data entry required by both HR and County staff.

The scope and objectives of the assessment are:

1. Review and provide recommendations on the business process related to HR management, including those related to the following specific divisions:
  - Workforce Data Management: Business practices review to prepare for new software upgrade or implementation/re-implementation of current software against current use of software.  
Main areas in use today
    - Core employee data
    - Recruitment
    - Benefits Administration
    - Payroll
    - Position Management
    - Discipline, Grievance, and Complaint Tracking
    - Learning (not an Enterprise Learning Management system or module)
  - Review the functions of the specified areas listed above and identify any duplication of services.
  - Provide recommendations for process improvement and restructuring, if any, based on current industry best practices, to improve consistency, efficiency and effectiveness. Clarify recommendations that can be put into place with resources we own today and what needs updated technology.
  - Identify mandated approvals (e.g., processes that require signature approval and what management level).

**Note: Business process improvement has already started with the following two units:**

**Recruitment: review of system capabilities and current policies and ordinances. We are currently meeting with stakeholders for their review.**

**Employee Relations: We just completed Complaints tracking. We are slated to review discipline tracking in early January 2018.**

Divisions that will only have their current interaction with the ERP system and Workforce Data Management unit processes reviewed.

This review will not include business practices outside the use of the system:

- Benefits and Wellness
- Employee and Labor Relations
- Finance – Payroll

Divisions that will not be evaluated as part of the Scope of Work:

- Risk
- Classification and Compensation

**Questions to be evaluated during Course of the Project.**

1. Identify the inter-relationship between divisions. Are they productive and effective?
2. Are the roles of each division clearly established and accepted by our customer base?
3. Are our business strategies, service objectives, and work practices in line with industry standards and best practices?
4. Have the divisions taken advantage of available technology and modern management practices to improve organizational effectiveness?
5. What process and procedure improvements need to be implemented to be ready for continued growth and new technology?
6. Are the divisions ready and supportive of making change? Is the County ready for HR to change?

**Key Project Deliverables**

1. Evaluate and document the current effectiveness of our policies, processes, procedures, systems, and controls.
2. Document Strengths, Weaknesses, Opportunities, and Threats (SWOT Analysis) with each identified division.
3. Document all recommended improvements. Including those that can be implemented with our current technology stack or what needs to be updated technology. Indicate where policy needs to be updated.
4. Identify barriers with county customers that need to be addressed.
5. Monthly status reports.
6. Items 1-4 to be summarized in a final report to be presented to HR Executive Leadership.

**Needed Outcomes of this RFQ**

Clackamas County Department of Human Resources is looking to this RFQ for the following outcomes:

1. HR needs to know what efforts need to be undertaken prior to the implementation of a new ERP system or the reimplementation of the existing ERP system.
2. Resources HR would need to continue/maintain updated business practices on a day to day basis.
3. A clear and concise understating of current best practices workflows for Government HR procedures.

The outcome desired from this RFQ and the resulting contract is to have a clear roadmap of what is needed for a successful transition of HR to modernized methods, practices, and technologies.

**Note: The budget outlined for this project is not inclusive of writing Policy or Procedures on behalf of the County.**

The contract will be awarded to the firm whose overall proposal, samples, answers to follow up questions, and references who are deemed to be in the best interest of the county.

**Key Dates:**

Final report due June 30, 2018

### 3. Sample Contract

Submission of a Quote in response to this RFQ indicates Quoter's willingness to enter into a contract containing substantially the same terms of the below referenced contract, which can be found at: <http://www.clackamas.us/bids/terms.html>, with the below indicated requirements. No action or response to the sample contract is required under this RFQ. The applicable sample contract is the:

Professional Services Contract (unless checked, item does not apply)

The following paragraphs of the Professional Services Contract will be applicable:

- Article I, Paragraph 4 – Travel and Other Expense is Authorized
- Article II, Paragraph 29 – Confidentiality
- Article II, Paragraph 29 – Criminal Background Check Requirements
- Article II, Paragraph 30 – Key Persons
- Exhibit A – On-Call Provision

The following insurance requirements will be applicable:

- Professional Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission or negligent acts.
- Commercial General Liability: combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage.
- Automobile Liability: combined single limit, or the equivalent, of not less than \$500,000 per occurrence for Bodily Injury and Property Damage.

### 4. Quote

Quotes should be short and concise with the following information:

1. Firm's qualifications: demonstrate past experience providing these services.
2. Detailed description of your approach to project, time schedule, project plan, sample Scope of Work to include standard roles and responsibilities, and sample final presentation.
3. Give examples of the ERP software solutions your firm has recommended.
4. Identify key staff that would be assigned to this project and their qualifications. *If submitting resumes in response to this section, please use professional resumes that do not contain any personal information such as home address or personal phone numbers.*
5. Provide fees on a time and material basis with a not to exceed. Note that if any travel reimbursement is included, such travel shall only be reimbursed in accordance with the County Contractor Travel Reimbursement Policy, hereby incorporated by reference and found at: <http://www.clackamas.us/bids/terms.html>; fees should not be loaded rates and must be in the following format:

Position Title	Hourly Billable Rate	Total Estimated Hours	Total Cost
i.e., Project Manager	\$		\$
i.e., Analyst	\$		\$
Expenses	N/A	N/A	\$

6. References of past clients with similar projects.
7. Availability for follow up questions and interviews (in person or phone).

### 5. Evaluation

Quotes will be evaluated based on subjective factors including, but not limited to: Firm experience, key staff experience, fees and not to exceed price, work plan, references, and proposal to complete the project.

**CLACKAMAS COUNTY CERTIFICATIONS**  
**RFQ #2017-64**

Each Quoter must read, complete and submit a copy of this Clackamas County Certification with their Quote. Failure to do so may result in rejection of Quote. By signature on this Certification the undersigned certifies that they are authorized to act on behalf of the Quoter and that under penalty of perjury the undersigned will comply with the following:

**SECTION I. OREGON TAX LAWS**

As required in ORS 279B.110(2)(3), the undersigned hereby certifies that, to the best of the undersigned's knowledge, the Quoter is not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250 and ORS chapters 118, 314, 316, 317, 318, 321, 323, and elderly rental assistance program under ORS 310.630 to 310.706, and local taxes administered by the Department of Revenue under ORS 305.620, all as applicable. If a contract is executed, this information will be reported to the Internal Revenue Service. Information not matching IRS records could subject Quoter to 28% backup withholding.

**SECTION II. NON-DISCRIMINATION**

The undersigned hereby certifies that the Quoter has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation, national origin, or any other protected class. Nor has Quoter or will Quoter discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emergency small business that is certified under ORS 200.055.

**SECTION III. CONFLICT OF INTEREST**

The undersigned hereby certifies that no elected official, officer, agency or employee of Clackamas County is personally interested, directly or indirectly, in any resulting contract from this RFQ, or the compensation to be paid under such contract, and that no representation, statements (oral or in writing), of the County, its Commissioners, officers, agents, or employees had induced Quoter to submit this Quote. In addition, the undersigned hereby certifies that this proposal is made without connection with any person, firm, or corporation submitting a quote for the same material, and is in all respects fair and without collusion or fraud.

**SECTION IV. COMPLIANCE WITH SOLICITATION**

The undersigned further agrees and certifies that they:

1. Have read, understand and agree to be bound by and comply with all requirements, instructions, specifications, terms and conditions of the RFQ (including any attachments); and
2. Are an authorized representative of the Quoter, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Quote or contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the RFQ and Quote; and
4. Will use recyclable products to the maximum extend economically feasible in the performance of the contract work set forth in this RFQ.

Firm Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Email: \_\_\_\_\_ OR CCB # (if applicable): \_\_\_\_\_

Business Designation (check one):

Corporation  Partnership  Sole Proprietorship  Non-Profit  Limited Liability Company

Resident Quoter, as defined in ORS 279A.120

Non-Resident Quote. Resident State: \_\_\_\_\_

Oregon Business Registry Number: \_\_\_\_\_

## CLACKAMAS COUNTY INSTRUCTIONS TO QUOTERS

Quotes are subject to the applicable provisions and requirements of the Clackamas County Local Contract Review Board Rule C-047-0270 (Intermediate Procurements) and Oregon Revised Statutes.

### QUOTE PREPARATION

1. **QUOTE FORMAT:** Quotes must be submitted as indicated in the RFQ. Quotes may be submitted in writing to Clackamas County via e-mail, mail or in person.
2. **CONFORMANCE TO RFQ REQUIREMENTS:** Quotes must conform to the requirements of the RFQ. Unless otherwise specified, all items quoted are to be new, unused and not remanufactured in any way. Any requested attachments must be submitted with the quote and in the required format. Quote prices must be for the unit indicated on the quote. Failure to comply with all requirements may result in quote rejection.
3. **ADDENDA:** Only documents issued as addenda by Clackamas County serve to change the RFQ in any way. No other directions received by the Quoter, written or verbal, serve to change the RFQ document. NOTE: IF YOU HAVE RECEIVED A COPY OF THE RFQ, YOU SHOULD CONSULT THE CLACKAMAS COUNTY BIDS AND CONTRACT INFORMATION WEBSITE ([www.clackamas.us/bids/index.html](http://www.clackamas.us/bids/index.html)) TO ENSURE THAT YOU HAVE NOT MISSED ANY ADDENDA OR ANNOUNCEMENTS. QUOTERS ARE NOT REQUIRED TO RETURN ADDENDUMS WITH THEIR QUOTE. HOWEVER, QUOTERS ARE RESPONSIBLE TO MAKE THEMSELVES AWARE OF, OBTAIN AND INCORPORATE ANY CHANGES MADE IN ANY ADDENDA ISSUED, AND TO INCORPORATE ANY CHANGES MADE BY ADDENDUM INTO THEIR FINAL QUOTE. FAILURE TO DO SO MAY, IN EFFECT, MAKE THE QUOTER'S QUOTE NON-RESPONSIVE, WHICH MAY CAUSE THE QUOTE TO BE REJECTED.
4. **USE of BRAND or TRADE NAMES:** Any brand or trade names used by Clackamas County in the specifications are for the purpose of describing and establishing the standard of quality, performance and characteristics desired and are not intended to limit or restrict competition. Quoters may submit quotes for substantially equivalent products to those designated unless the RFQ provides that a specific brand is necessary because of compatibility requirements, etc. All such brand substitutions shall be subject to approval by Clackamas County.
5. **PRODUCT IDENTIFICATION:** Quoters must clearly identify all products quoted. Brand name and model or number must be shown. Clackamas County reserves the right to reject any quote when the product information submitted with the quote is incomplete.
6. **FOB DESTINATION:** Unless specifically allowed in the RFQ, ***QUOTE PRICE MUST BE F.O.B. DESTINATION with all transportation and handling charges included in the Quote.***
7. **DELIVERY:** Delivery time must be shown in number of calendar days after receipt of purchase order.
8. **EXCEPTIONS:** Any deviation from quote specifications, or the form of sample contract referenced in this RFQ, may result in quote rejection at County's sole discretion.
9. **SIGNATURE ON QUOTE:** Quotes must be signed by an authorized representative of the Quoter. Signature on a quote certifies that the quote is made without connection with any person, firm or corporation making a quote for the same goods and/or services and is in all respects fair and without collusion or fraud. Signature on a quote also certifies that the Quoter has read and fully understands all quote specifications, and the sample contract referenced in this RFQ (including insurance requirements). No consideration will be given to any claim resulting from quoting without comprehending all requirements of the RFQ.
10. **QUOTE MODIFICATION:** Quotes, once submitted, may be modified in writing before the time and date set for quote closing. Any modifications should be signed by an authorized representative, and state that the new document supersedes or modifies the prior quote. Quoters may not modify quotes after quote closing time.
11. **QUOTE WITHDRAWALS:** Quotes may be withdrawn by request in writing signed by an authorized representative and received by Clackamas County prior to the Quote Due Date/Time. Quotes may also be withdrawn in person before the Quote Due Date/Time upon presentation of appropriate identification.

12. **QUOTE SUBMISSION:** Quotes may be submitted by returning to Clackamas County Procurement Division in the location designated in the introduction of the RFQ via email, mail or in person; however, no oral or telephone quotes will be accepted. Envelopes, or e-mails containing Quotes should contain the RFQ Number and RFQ Title.

#### **QUOTE EVALUATION AND AWARD**

1. **PRIOR ACCEPTANCE OF DEFECTIVE PROPOSALS:** Due to limited resources, Clackamas County generally will not completely review or analyze quotes which fail to comply with the requirements of the RFQ or which clearly are not the best quotes, nor will Clackamas County generally investigate the references or qualifications of those who submit such quotes. Therefore, neither the return of a quote, nor acknowledgment that the selection is complete shall operate as a representation by Clackamas County that an unsuccessful quote was complete, sufficient, or lawful in any respect.
2. **DELIVERY:** Significant delays in delivery may be considered in determining award if early delivery is required.
3. **CASH DISCOUNTS:** Cash discounts will not be considered for award purposes unless stated in the RFQ.
4. **PAYMENT:** Quotes which require payment in less than 30 days after receipt of invoice or delivery of goods, whichever is later, may be rejected.
5. **INVESTIGATION OF REFERENCES:** Clackamas County reserves the right to investigate references and or the past performance of any Quoter with respect to its successful performance of similar services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, sub-contractors, and workers. Clackamas County may postpone the award or execution of the contract after the announcement of the apparent successful Quoter in order to complete its investigation. Clackamas County reserves the right to reject any quote or to reject all quotes at any time prior to Clackamas County's execution of a contract if it is determined to be in the best interest of Clackamas County to do so.
6. **METHOD OF AWARD:** Clackamas County reserves the right to make the award by item, groups of items or entire quote, whichever is in the best interest of Clackamas County.
7. **QUOTE REJECTION:** Clackamas County reserves the right to reject any and all quotes.
8. **QUOTE RESULTS:** Quoters who submit a quote will be notified of the RFQ results. Awarded quote files are public records and available for review by submitting a public records request or by appointment.