

**ADAMS COUNTY
PROFESSIONAL SERVICE AGREEMENT
FOR EMPLOYEE SURVEY SERVICES (2018.019)**

THIS AGREEMENT ("Agreement") is made this 20 day of JUNE 2018, by and between the Adams County Board of County Commissioners, located at 4430 South Adams County Parkway, Brighton, Colorado 80601, hereinafter referred to as the "County," and Elevated Insights, located at 525 North Tejon Street, Colorado Springs, Colorado 80903, hereinafter referred to as the "Contractor." The County and the Contractor may be collectively referred to herein as the "Parties."

The County and the Contractor, for the consideration herein set forth, agree as follows:

1. SERVICES OF THE CONTRACTOR:

- 1.1. All work shall be in accordance with the attached RFP 2018.019 EMPLOYEE SATISFACTION AND CULTURAL HEALTH SURVEY and the Contractor's response to RFP 2018.019 attached hereto as Exhibit A, and incorporated herein by reference. Should there be any discrepancy between Exhibit A and this Agreement the terms and conditions of this Agreement shall prevail.
- 1.2. Emergency Services: In the event the Adams County Board of County Commissioners declares an emergency, the County may request additional services (of the type described in this Agreement or otherwise within the expertise of the Contractor) to be performed by the Contractor. If the County requests such additional services, the Contractor shall provide such services in a timely fashion given the nature of the emergency, pursuant to the terms of this Agreement. Unless otherwise agreed to in writing by the parties, the Contractor shall bill for such services at the rates provided for in this Agreement.

- 2. RESPONSIBILITIES OF THE COUNTY:** The County shall provide information as necessary or requested by the Contractor to enable the Contractor's performance under this Agreement.

3. TERM:

- 3.1. Term of Agreement: The Term of this Agreement shall be for two years from the date first written above.
- 3.2. Renewal Option: The County, at its sole option, may offer to renew this Agreement as necessary for up to two, two-year renewals (Project years 2020 and 2022) providing satisfactory service is given and all terms and conditions of this Agreement have been fulfilled. Such renewals must be mutually agreed upon in writing by the County and the Contractor.

4. **PAYMENT AND FEE SCHEDULE:** The County shall pay the Contractor for services furnished under this Agreement, and the Contractor shall accept as full payment for those services, the sum of eighteen thousand, seven hundred fifty dollars and zero cents (\$18,750.00).

4.1. Payment pursuant to this Agreement, whether in full or in part, is subject to and contingent upon the continuing availability of County funds for the purposes hereof. In the event that funds become unavailable, as determined by the County, the County may immediately terminate this Agreement or amend it accordingly.

5. **INDEPENDENT CONTRACTOR:** In providing services under this Agreement, the Contractor acts as an independent contractor and not as an employee of the County. The Contractor shall be solely and entirely responsible for his/her acts and the acts of his/her employees, agents, servants, and subcontractors during the term and performance of this Agreement. No employee, agent, servant, or subcontractor of the Contractor shall be deemed to be an employee, agent, or servant of the County because of the performance of any services or work under this Agreement. The Contractor, at its expense, shall procure and maintain workers' compensation insurance as required by law. **Pursuant to the Workers' Compensation Act § 8-40-202(2)(b)(IV), C.R.S., as amended, the Contractor understands that it and its employees and servants are not entitled to workers' compensation benefits from the County. The Contractor further understands that it is solely obligated for the payment of federal and state income tax on any moneys earned pursuant to this Agreement.**

6. **NONDISCRIMINATION:**

6.1. **The Contractor shall not discriminate against any employee or qualified applicant for employment because of age, race, color, religion, marital status, disability, sex, or national origin. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices provided by the local public agency setting forth the provisions of this nondiscrimination clause. Adams County is an equal opportunity employer.**

6.1.1. The Contractor will cause the foregoing provisions to be inserted in all subcontracts for any work covered by this Agreement so that such provisions will be binding upon each subcontractor, provided that the foregoing provisions shall not apply to contracts or subcontracts for standard commercial supplies or raw materials.

7. **INDEMNIFICATION:** The Contractor agrees to indemnify and hold harmless the County, its officers, agents, and employees for, from, and against any and all claims, suits, expenses, damages, or other liabilities, including reasonable attorney fees and court costs, arising out of damage or injury to persons, entities, or property, caused or sustained by any person(s) as a result of the Contractor's performance or failure to perform pursuant to the terms of this Agreement or as a result of any

subcontractors' performance or failure to perform pursuant to the terms of this Agreement.

8. **INSURANCE:** The Contractor agrees to maintain insurance of the following types and amounts:

8.1. **Commercial General Liability Insurance:** to include products liability, completed operations, contractual, broad form property damage and personal injury.

8.1.1. Each Occurrence: \$1,000,000

8.1.2. General Aggregate: \$2,000,000

8.2. **Comprehensive Automobile Liability Insurance:** to include all motor vehicles owned, hired, leased, or borrowed.

8.2.1. Bodily Injury/Property Damage: \$1,000,000 (each accident)

8.2.2. Personal Injury Protection: Per Colorado Statutes

8.3. **Workers' Compensation Insurance:** Per Colorado Statutes

8.4. **Professional Liability Insurance:** to include coverage for damages or claims for damages arising out of the rendering, or failure to render, any professional services, as applicable.

8.4.1. Each Occurrence: \$1,000,000

8.4.2. This insurance requirement applies only to the Contractors who are performing services under this Agreement as professionals licensed under the laws of the State of Colorado, such as physicians, lawyers, engineers, nurses, mental health providers, and any other licensed professionals.

8.5. **Adams County as "Additional Insured":** The Contractor's commercial general liability, and comprehensive automobile liability, insurance policies and/or certificates of insurance shall be issued to include Adams County as an "additional insured" and shall include the following provisions:

8.5.1. Underwriters shall have no right of recovery or subrogation against the County, it being the intent of the parties that the insurance policies so affected shall protect both parties and be primary coverage for any and all losses resulting from the actions or negligence of the Contractor.

8.5.2. The insurance companies issuing the policy or policies shall have no recourse against the County for payment of any premiums due or for any assessments under any form of any policy.

8.5.3. Any and all deductibles contained in any insurance policy shall be assumed by and at the sole risk of the Contractor.

- 8.6. Licensed Insurers: All insurers of the Contractor must be licensed or approved to do business in the State of Colorado. Upon failure of the Contractor to furnish, deliver and/or maintain such insurance as provided herein, this Agreement, at the election of the County, may be immediately declared suspended, discontinued, or terminated. Failure of the Contractor in obtaining and/or maintaining any required insurance shall not relieve the Contractor from any liability under this Agreement, nor shall the insurance requirements be construed to conflict with the obligations of the Contractor concerning indemnification.
- 8.7. Endorsement: Each insurance policy herein required shall be endorsed to state that coverage shall not be suspended, voided, or canceled without thirty (30) days prior written notice by certified mail, return receipt requested, to the County.
- 8.8. Proof of Insurance: At any time during the term of this Agreement, the County may require the Contractor to provide proof of the insurance coverage or policies required under this Agreement.

9. DAMAGES ARISING FROM BREACH OF PERFORMANCE OBLIGATIONS

- 9.1. Notwithstanding anything else set forth in this Agreement, if Contractor fails to comply with all terms of this contract, including but not limited to, its obligation to perform its work in a workmanlike manner in accordance with all codes, plans, specifications and industry standards, Contractor shall be liable to County for all damages arising from the breach, including but not limited to, all attorney fees, costs and other damages.

10. WARRANTY:

- 10.1. The Contractor warrants and guarantees to the County that all work, equipment, and materials furnished under the Agreement are free from defects in workmanship and materials for a period of one year after final acceptance by the County. The Contractor further warrants and guarantees that the plans and specifications incorporated herein are free of fault and defect sufficient for Contractor to warrant the finished product after completion date. Should the Contractor fail to proceed promptly in accordance with this guarantee, the County may have such work performed at the expense of the Contractor. This section does not relieve the Contractor from liability for defects that become known after one year.

11. TERMINATION:

- 11.1. For Cause: If, through any cause, the Contractor fails to fulfill its obligations under this Agreement in a timely and proper manner, or if the Contractor violates any of the covenants, conditions, or stipulations of this Agreement, the County shall thereupon have the right to immediately terminate this Agreement,

upon giving written notice to the Contractor of such termination and specifying the effective date thereof.

- 11.2. For Convenience: The County may terminate this Agreement at any time by giving written notice as specified herein to the other party, which notice shall be given at least thirty (30) days prior to the effective date of the termination. If this Agreement is terminated by the County, the Contractor will be paid an amount that bears the same ratio to the total compensation as the services actually performed bear to the total services the Contractor was to perform under this Agreement, less payments previously made to the Contractor under this Agreement.

12. MUTUAL UNDERSTANDINGS:

- 12.1. Jurisdiction and Venue: The laws of the State of Colorado shall govern as to the interpretation, validity, and effect of this Agreement. The parties agree that jurisdiction and venue for any disputes arising under this Agreement shall be with Adams County, Colorado.
- 12.2. Compliance with Laws: During the performance of this Agreement, the Contractor agrees to strictly adhere to all applicable federal, state, and local laws, rules and regulations, including all licensing and permit requirements. The parties hereto aver that they are familiar with § 18-8-301, et seq., C.R.S. (Bribery and Corrupt Influences), as amended, and § 18-8-401, et seq., C.R.S. (Abuse of Public Office), as amended, , the Clean Air Act (42 U.S.C. 7401-7671q), and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended, and that no violation of such provisions are present. The Contractor warrants that it is in compliance with the residency requirements in §§ 8-17.5-101, et seq., C.R.S. Without limiting the generality of the foregoing, the Contractor expressly agrees to comply with the privacy and security requirements of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
- 12.3. OSHA: The Contractor shall comply with the requirements of the Occupational Safety and Health Act (OSHA) and shall review and comply with the County's safety regulations while on any County property. Failure to comply with any applicable federal, state or local law, rule, or regulation shall give the County the right to terminate this agreement for cause.
- 12.4. Record Retention: The Contractor shall maintain records and documentation of the services provided under this Agreement, including fiscal records, and shall retain the records for a period of three (3) years from the date this Agreement is terminated. Said records and documents shall be subject at all reasonable times to inspection, review, or audit by authorized Federal, State, or County personnel.
- 12.5. Assignability: Neither this Agreement, nor any rights hereunder, in whole or in part, shall be assignable or otherwise transferable by the Contractor without the prior written consent of the County.

12.6. Waiver: Waiver of strict performance or the breach of any provision of this Agreement shall not be deemed a waiver, nor shall it prejudice the waiving party's right to require strict performance of the same provision, or any other provision in the future, unless such waiver has rendered future performance commercially impossible.

12.7. Force Majeure: Neither party shall be liable for any delay or failure to perform its obligations hereunder to the extent that such delay or failure is caused by a force or event beyond the control of such party including, without limitation, war, embargoes, strikes, governmental restrictions, riots, fires, floods, earthquakes, or other acts of God.

12.8. Notice: Any notices given under this Agreement are deemed to have been received and to be effective:

1) Three (3) days after the same shall have been mailed by certified mail, return receipt requested;

2) Immediately upon hand delivery; or

3) Immediately upon receipt of confirmation that an E-mail was received. For the purposes of this Agreement, any and all notices shall be addressed to the contacts listed below:

Department: Adams County Organizational Effectiveness
Contact: Max Cercone
Address: 4430 South Adams County Parkway
City, State, Zip: Brighton, Colorado 80601
Phone: 720-523-6214
E-mail: mcercone@adcogov.org

Department: Adams County Purchasing
Contact: Anna Forristall
Address: 4430 South Adams County Parkway
City, State, Zip: Brighton, Colorado 80601
Phone: 720-523-6297
E-mail: aforristall@adcogov.org

Department: Adams County Attorney's Office
Address: 4430 South Adams County Parkway
City, State, Zip: Brighton, Colorado 80601
Phone: 720.523.6116

Contractor: Elevated Insights
Contact: Joey Torretto
Address: 525 North Tejon Street
City, State, Zip: Colorado Springs, Colorado 80903
Phone: 719-590-9999
E-mail: joey@elevatedinsights.com

- 12.9. Integration of Understanding: This Agreement contains the entire understanding of the parties hereto and neither it, nor the rights and obligations hereunder, may be changed, modified, or waived except by an instrument in writing that is signed by the parties hereto.
- 12.10. Severability: If any provision of this Agreement is determined to be unenforceable or invalid for any reason, the remainder of this Agreement shall remain in effect, unless otherwise terminated in accordance with the terms contained herein.
- 12.11. Authorization: Each party represents and warrants that it has the power and ability to enter into this Agreement, to grant the rights granted herein, and to perform the duties and obligations herein described.
- 12.12. Confidentiality: All documentation related to this Agreement will become the property of Adams County. All documentation maintained or kept by Adams County shall be subject to the Colorado Open Records Act, C.R.S. 24-72-201 *et seq.* ("CORA"). The County does not guarantee the confidentiality of any records.

13. AMENDMENTS, CHANGE ORDERS OR EXTENSIONS:

- 13.1. Amendments or Change Orders: The County may, from time to time, require changes in the scope of the services of the Contractor to be performed herein including, but not limited to, additional instructions, additional work, and the omission of work previously ordered. The Contractor shall be compensated for all authorized changes in services, pursuant to the applicable provision in the Solicitation, or, if no provision exists, pursuant to the terms of the Amendment or Change Order.
- 13.2. Extensions: The County may, upon mutual written agreement by the parties, extend the time of completion of services to be performed by the Contractor.

14. COMPLIANCE WITH C.R.S. § 8-17.5-101, ET. SEQ. AS AMENDED 5/13/08:

Pursuant to Colorado Revised Statute (C.R.S.); § 8-17.5-101, *et seq.*, as amended May 13, 2008, the Contractor shall meet the following requirements prior to signing this Agreement (public contract for service) and for the duration thereof:

- 14.1. The Contractor shall certify participation in the E-Verify Program (the electronic employment verification program that is authorized in 8 U.S.C. § 1324a and jointly administered by the United States Department of Homeland Security and the Social Security Administration, or its successor program) or the Department Program (the employment verification program established by the Colorado Department of Labor and Employment pursuant to C.R.S. § 8-17.5-102(5)) on the attached certification.
- 14.2. The Contractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.

- 14.3. The Contractor shall not enter into a contract with a subcontractor that fails to certify to the Contractor that the subcontractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.
- 14.4. At the time of signing this public contract for services, the Contractor has confirmed the employment eligibility of all employees who are newly hired for employment to perform work under this public contract for services through participation in either the E-Verify Program or the Department Program.
- 14.5. The Contractor shall not use either the E-Verify Program or the Department Program procedures to undertake pre-employment screening of job applicants while this public contract for services is being performed.
- 14.6. If the Contractor obtains actual knowledge that a subcontractor performing work under this public contract for services knowingly employs or contracts with an illegal alien, the Contractor shall: notify the subcontractor and the County within three (3) days that the Contractor has actual knowledge that the subcontractor is employing or contracting with an illegal alien; and terminate the subcontract with the subcontractor if within three days of receiving the notice required pursuant to the previous paragraph, the subcontractor does not stop employing or contracting with the illegal alien; except that the Contractor shall not terminate the contract with the subcontractor if during such three (3) days the subcontractor provides information to establish that the subcontractor has not knowingly employed or contracted with an illegal alien.
- 14.7. Contractor shall comply with any reasonable requests by the Department of Labor and Employment (the Department) made in the course of an investigation that the Department is undertaking pursuant to the authority established in C.R.S. § 8-17.5-102(5).
- 14.8. If Contractor violates this Section, of this Agreement, the County may terminate this Agreement for breach of contract. If the Agreement is so terminated, the Contractor shall be liable for actual and consequential damages to the County.

REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY

IN WITNESS WHEREOF, the Parties have caused their names to be affixed hereto:

**ADAMS COUNTY, COLORADO
COUNTY MANAGER**

[Signature]
Raymond H. Gonzales

26 June 2018
Date

ELEVATED INSIGHTS

[Signature]
Signature

6/21/18
Date

Debbie Balch
Printed Name

President
Title

Attest:
Stan Martin, Clerk and Recorder

[Signature]
Deputy Clerk

Approved as to Form:

[Signature]
Adams County Attorney's Office

NOTARIZATION OF CONTRACTOR'S SIGNATURE:

COUNTY OF El Paso

STATE OF Colorado)SS.

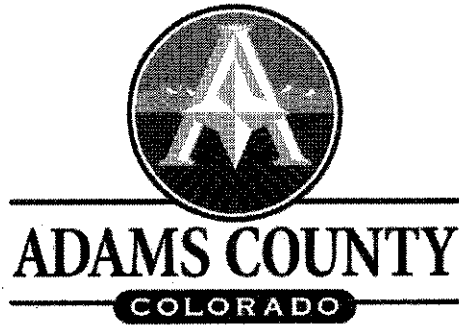
Signed and sworn to before me this 21 day of June, 2018,

by Debbie Balch

Robert C Brown Jr
Notary Public

ROBERT C BROWN JR
NOTARY PUBLIC
STATE OF COLORADO
NOTARY ID 20184014323
MY COMMISSION EXPIRES MARCH 29, 2022

My commission expires on: 29 March 2022



Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

REQUEST FOR PROPOSAL ADDENDUM ONE

RFP Issue Date: **April 23, 2018**

RFP Number: **RFP-AF-2018.019**

RFP Title: **EMPLOYEE SATISFACTION AND CULTURAL
HEALTH SURVEY**

RFP Questions Due: **May 8, 2018 at midnight MT**

Addendum One issued: May 10, 2018

Proposal will be received until: **May 17, 2018 at 2:00 pm MT, (our Clock)**
Adams County Government Center
Central Front Lobby
4430 South Adams County Parkway,
Brighton, CO 80601

For additional information contact: **Anna Forristall, Contract Specialist III**
720-523-6297
aforristall@adcogov.org

CONTRACTOR IS RESPONSIBLE FOR OBTAINING AND ACKNOWLEDGING RECEIPT OF ALL SUBSEQUENT ADDENDA FROM THE ROCKY MOUNTAIN E-PURCHASING SYSTEM (BIDNET). FAILURE TO ACKNOWLEDGE ALL ADDENDUM/ADDENDA MAY DEEM THE CONTRACTOR NON-RESPONSIVE. ADDENDUM/ADDENDA SHALL BE ACKNOWLEDGED ON THE CONTRACTOR'S STATEMENT FORM IN THE SPACE PROVIDED.

ADDENDUM #1

The purpose of this addendum is to answer Vendor submitted questions regarding RFP-AF-2018.019 Employee Satisfaction and Cultural Health Survey.

1. What contact information will you provide in the employee database?
A) The primary point of contact will be via employee email addresses. We may consider mailings if the vendor believes this to be a beneficial strategy.
2. Will we be pursuing responses from all county employees, or just a portion of them?
A) We would like all County employees to be surveyed.
3. Is it appropriate to offer employees incentives, such as gift cards for responding?
A) No incentives should be offered.
4. Can you please clarify the total number of county employees that the satisfaction survey will be distributed to?
A) The County employs approximately 2,226 employees. However, some departments are given the opportunity to opt out, which would bring our final figure close to 1,300 employees.
5. Can you please clarify the total number of county employees that the satisfaction will be distributed to?
A) Approximately 1300.
6. Scope of Work III. Response format (page 13) states "There must not be any pricing information within the hard copy proposals." Should the electronic/PDF version submitted via thumb drive include the pricing information, or should it also be excluded from that file?
A) Pricing should be excluded from the electronic version of the proposal.
7. Can you provide the vendor name for the 2016 Employee Satisfaction Survey, and if you work with that vendor was satisfactory? Will any preference be given to a past vendor for this continuation survey?
A) National Research Center provided the 2016 Survey and their work was satisfactory. The County doesn't have vendor preferences of any kind.
8. In terms of timeline, the RFP states that the survey should be released by the first week of October. What are the expectations regarding the release of the Summary Report (Scope of Work II.B.1) and presentation of findings (Scope of Work II.B.3)?
A) We expect the vendor to provide the summary report and presentation of findings between 6-8 weeks after the release of the survey.
9. Regarding Scope of Work IV. Submittal Format, does the 20-page limit include or exclude the required Contractor's Certification of Compliance, Contractor's

Statement, Reference Form, Vendor Information Form, and W9? Can these forms be submitted in the Appendices?

- A) The 20-page limit does NOT include the required forms: Contractor's Certification of Compliance, Contractor's Statement, Reference Form, Vendor Information Forms, and W9. These forms may be submitted in Appendices or in whatever format is best to present them.
10. How many employees were sent surveys in 2016 and how many employees are there currently that will be sent surveys?
- A) 1,328 employees were invited to participate. We anticipate approximately the same number of employees participating in this round.
11. How was the 2016 survey administered? Was it paper, email, etc.?
- A) The 2016 survey was administered by sending the questionnaire out via email.
12. Approximately, how many surveys will be needed for one administration? What was the sample size in 2016?
- A) We expect approximately 1300 surveys to be sent out. The 2016 response rate was 61% (812/1328). Per the RFP, we'd like the response rate increased by 5%.
13. Would the County prefer to administer the survey on paper, online, or by a mix method?
- A) The County prefers that the survey be administered online.
14. Would the County be able to provide employee details? (e.g., IDs, emails, address if on paper, and etc.)?
- A) We will provide emails if the vendor chooses to send the survey via email.
15. How long was the 2016 survey (how many questions)?
- A) The 2016 survey had 63 questions.
16. How many open-ended questions would the County be looking to include?
- A) No more than five.
17. Is the County open to the format in which the report is provided – PowerPoint might be a good option ?
- A) We are open, but we'd like a physical artifact (not PowerPoint slides) that can be disseminated around the County offices. PowerPoint will be sufficient for the presentation, but should not be used as a medium for report generation on this project.
18. How many employees will be invited to complete the survey?
- A) Approximately 1300.
19. Can all employees complete the survey online, including from handheld devices?
- A) The majority of staff will be able to complete the survey online. However, there is a percentage of staff that do not have regular access to a computer. These employees will need to be accessed through a different medium.

20. Our strategy is to send employees an email invitation with a link to the survey. They can then access the survey online. Are there County employees who may not receive an email invitation? If so, approximately how many employees are in this category?
A) They are approximately 200-300 employees that do not have regular access to computers.
21. Will the survey be in English only?
A) The survey should be offered in both English and Spanish if possible. Please provide a quote if this is not in your basic offering.
22. Will we need to compare the 2018 results to the 2016 results, question-by-question?
A) No. Vendors will not be required to compare question-by-question, but theme-by-theme.
23. Can you provide us with the questions from the 2016 survey, please?
A) The 2016 survey questions will be provided to the successful vendor.
24. The RFP is for a "Satisfaction and Cultural Health Survey." We conduct employee engagement surveys that also assess satisfaction and organizational culture. Will that approach be acceptable?
A) Yes
25. Why has the County decided to issue an RFP for a new survey, as opposed to re-using the 2016 survey?
A) A vendor provided services in '16 and the contract didn't extend beyond that timeframe.
26. In the RFP, you state that, "All survey responses are the property of the county." We make a commitment to the employees in the organizations we work with not to provide the organization with any individual employee surveys. This ensures confidentiality of employee responses. Are you expecting us provide you with the actual completed surveys?
A) No. This provision is meant to ensure that vendors do not use survey data collected on this project in any other ventures not associated with Adams County.
27. Who conducted the 2016 survey?
A) National Research Center
28. What was the cost of the 2016 survey?
A) \$15,000
29. Do you have a budget for the 2018 survey? If so what is that amount?
A) Please see page 17 of the solicitation, Section V. Vendor Selection Criteria, #6a: Total project budget shall not exceed \$20,000.
30. How many breakout reports will you need (e.g., for departments, locations etc.)?
A) Approximately 80.

31. We only provide breakout reports (e.g., by department or demographic group) when there are at least 10 responses. Will this be acceptable?
A) Yes
32. Are you required to re-bid the survey administration?
A) No, the County isn't required to re-bid this every two years.
33. Would you like us to provide descriptions and cost estimates for supplemental services such as focus groups and action-planning workshops?
A) Yes
34. What steps did the County take in response to the 2016 survey?
A) We held our own focus groups and continue to do so. We have established a series of employee-informed recommendations and have been working through them. The progress is regularly reported out to the general employee base.
35. The RFP states that the County desires conclusions that are, among other things, "intuitive." Our approach is to base conclusions and recommendations on the results of the survey. Sometimes these results are not intuitive. Will this be acceptable?
A) Yes
36. According to the RFP, the County would like to increase the response rate by 5%. Does that mean a 5% increase over the 61% response rate (i.e., an increase to 64%) or a 5 percentage-point increase (to 66%)?
A) 5 percentage point increase to 66%.
37. How many employees would be surveyed in this project?
A) Approximately 1300
38. Will key leadership and management be available to assist with promotion and communication?
A) Yes
39. It's left up to the consultant to determine the correct deployment methodology and platform. There are no RFP requirements for a particular platform. Is that correct?
A) Yes

Please incorporate this information into your RFP response.

The Proposal due date and time shall remain May 17, 2018 at 2:00 p.m.

MT

End of Addendum #1



ADAMS COUNTY
COLORADO

Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

**REQUEST FOR PROPOSAL
COVER SHEET**

RFP Issue Date: **April 23, 2018**

RFP Number: **RFP-AF-2018.019**

RFP Title: **EMPLOYEE SATISFACTION AND CULTURAL HEALTH SURVEY**

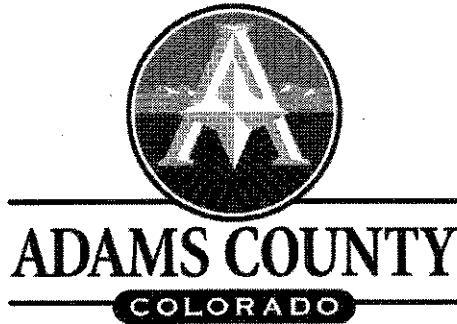
RFP Questions Due: **May 8, 2018 at midnight MDT**

Proposal will be received until: **May 17, 2018 at 2:00 pm MDT, (our Clock)**
Adams County Government Center
Central Front Lobby
4430 South Adams County Parkway,
Brighton, CO 80601

For additional information please contact: **Anna Forristall, Contract Specialist III**
720-523-6297
aforristall@adcogov.org

Documents included in this package:

- Proposal Instructions
- General Terms and Conditions
- Scope of Work (SOW)
- Pricing Form
- Contractor's Certificate of Compliance
- Contractor's Statement
- References Form
- Vendor Information Form
- Appendix A – Sample Agreement



Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

REQUEST FOR PROPOSAL PROPOSAL INSTRUCTIONS

1. **PURPOSE/BACKGROUND:** The Adams County Board of Commissioners by and through its Purchasing Division of the Finance Department is accepting proposals for the purchase of services for an **EMPLOYEE SATISFACTION AND CULTURAL HEALTH SURVEY** as specified herein from a source of supply that will provide prompt and efficient service to the County.
2. **SUBMISSION OF PROPOSALS:** The proposal must be received before the due date and time as specified in this Solicitation. The Contractor is responsible for addressing the envelope as indicated below. If the submittal arrives late, it may be returned unopened. Address the envelope(s) as follows:

Mailing Address:

Adams County Government Center
Purchasing Division
4430 South Adams County Parkway
Brighton, CO 80601
ATTN: Anna Forristall
Contract Specialist III
RFP-AF-2018.019

Hand Deliveries accepted:

Adams County Government Center
First Floor Central Lobby Receptionist
4430 South Adams County Parkway
Brighton, CO 80601
ATTN: Anna Forristall
Contract Specialist III
RFP-AF-2018.019

3. All documents related to this RFP will be posted on the Rocky Mountain Bid System (BidNet) at: <http://www.bidnetdirect.com/colorado/solicitations/open-bids>
 - 3.1. Interested parties must register with this service (free) to view and download these documents.
4. **TERM OF AGREEMENT:** This is a one year agreement with the option of two one year renewals. Because this Survey project takes place every other year, the next term shall begin in the year 2020 at the option of the Contractor.
 - 4.1. **THE OPTION TO RENEW FOR ONE (1) SUBSEQUENT TERM** (In the year 2020): The prices and/or discounts quoted by the Contractor in its Proposal shall prevail for the first one year term of the Agreement, at which time the County shall have the option to renew the Agreement for one (1) subsequent one year period for the year 2020 and to negotiate price for the renewal one year term. Continuation of the Agreement beyond the initial period is a County prerogative and not a right of the Contractor. This prerogative will be exercised only when

such continuation is clearly in the best interest of the County and upon budget approval.

5. CONTRACTUAL OBLIGATIONS

5.1. The successful Contractor will be required to sign an Agreement substantially similar to the Sample Agreement in Appendix A. The County reserves the right to add or delete provisions to the form prior to Agreement execution.

5.2. Issuance of this Solicitation does not commit the County to award any Agreement or to procure or Agreement for any equipment, materials or services.

5.3. If a formal Agreement is required, the Contractor agrees and understands that a Notice of Award does not constitute an Agreement or create a property interest of any nature until an Agreement is signed by the Awardee and the Board of County Commissioners and/or their authorized designee.

5.4. Contractor is responsible for reviewing the form Agreement and understanding the terms and conditions contained therein, including, but not limited to, insurance requirements, indemnification, illegal aliens, equal opportunity, non-appropriation, and termination.

5.5. Contractor's Response must state its willingness to enter into the form Agreement or Contractor shall identify and include any proposed revisions they have for the form Agreement. Any proposed revisions made by the Contractor after the County Notice of Intent to Award the Solicitation may be grounds for rescinding said Notice. The identification of willingness to enter into the standard Agreement is for general purposes at this time, but is part of the evaluation process and must be included. There may be negotiations on a project-by-project basis that provide further clarification.

5.6. Incorrect Pricing/Invoicing. As part of any award resulting from this process, Contractor(s) will discount all transactions as agreed. In the event the County discovers, through its Agreement monitoring process or formal audit process, that material or services were priced/invoiced incorrectly, Contractor(s) agree to promptly refund all overpayments and to pay all reasonable audit expenses incurred as a result of the non-compliance.

5.7. The County may, during the term of the Agreement and any extensions/renewals, request additional work at other locations throughout Adams County by the successful Contractor.

6. METHOD OF AWARD - It is the intent of the County to award an Agreement to the Contractor who provides the best value for Adams County.

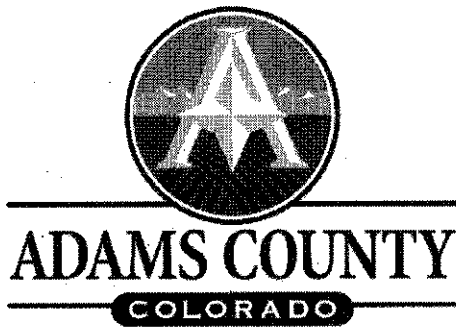
6.1. Pricing **MUST** be submitted in a separate sealed envelope.

6.2. Evaluation criteria, other than costs, are evaluated first. After rating the written Responses, costs are then considered against trade-offs such as satisfaction of

requirements in the Solicitation, qualifications, risk and incentives, and financial condition of the Contractor.

- 6.3. The County reserves the right to conduct negotiations with Contractors and to accept revisions of Responses. During this negotiation period, the County will not disclose any information derived from Responses submitted, or from discussions with other Contractors. Once an award is made, the Solicitation file and the Responses contained therein are in the public record.
- 7.7. Questions which arise during the Response preparation period regarding issues around this Solicitation, purchasing and/or award should be directed, via e-mail, to Anna Forristall, Contract Specialist III, aforristall@adcogov.org. The Contractor submitting the question(s) shall be responsible for ensuring the question(s) is received by the County. Questions shall be submitted by **May 8, 2018 at midnight MDT**.
7. Any official interpretation of this RFP must be made by an agent of the County's Purchasing Division who is authorized to act on behalf of the County. The County shall not be responsible for interpretations offered by employees of the County who are not agents of the County's Purchasing Division.
8. **COOPERATIVE PURCHASING:** Adams County encourages cooperative purchasing in an effort to assist other agencies to reduce their cost of bidding and to make better use of taxpayer dollars through volume purchasing. Contractor(s) may, at their discretion, agree to extend the prices and/or terms of the resulting award to other state or local government agencies, school districts, or political subdivisions in the event they would have a need for the same product/service. Usage by any entity shall not have a negative impact on Adams County in the current term or in any future terms.
- The Contractor(s) must deal directly with any governmental agency concerning the placement of purchase orders/agreements, freight/delivery charges, Contractual disputes, invoices, and payments. Adams County shall not be liable for any costs or damages incurred by any other entity.
9. **BUDGET:** Budget for this project is disclosed in the Statement of Work section.
10. **DEBARMENT:** By submitting this proposal, the Contractor warrants and certifies they are eligible to submit a proposal because their company and/or subcontract(s) is/are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in a transaction by any Federal, State, or local department or agency.

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Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

REQUEST FOR PROPOSAL GENERAL TERMS AND CONDITIONS

1. **APPLICABILITY:** These General Terms and Conditions apply, but are not limited, to all bids, proposals, qualifications and quotations (hereinafter referred to as "Proposal" or "Response") made to Adams County (hereinafter referred to as "County") by all prospective Contractors, bidders, firms, companies, publishers, consultants, or suppliers (herein after referred to as "Contractor" or "Contractors") in response, but not limited, to all Invitations to Bid, Requests for Proposals, Requests for Qualifications, and Requests for Quotations (hereinafter referred to as "Solicitation" or "Solicitations").
2. **CONTENTS OF PROPOSAL**
 - 2.1. **GENERAL CONDITIONS:** Contractors are required to submit their Proposals in accordance with the following expressed conditions:
 - 2.1.1. Contractors shall make all investigations necessary to thoroughly understand the requirements of the Solicitation. No plea of ignorance by the Contractor of conditions that exist or that may hereafter exist will be accepted as the basis for varying the requirements of the County or the compensation to the Contractor.
 - 2.1.2. Contractors are advised that all County Solicitations and Agreements are subject to all requirements contained in the County's Purchasing Division's Policies and Procedures and state and federal statutes. When conflicts occur, the highest authority will prevail.
 - 2.1.3. Contractors are required to state exactly what they intend to furnish to the County in their Proposal and must indicate any variances to the terms, conditions, and specifications of this Solicitation no matter how slight. If variations are not stated in a Contractor's Proposal, it shall be construed that the Contractor's Proposal fully complies with all conditions identified in this Solicitation.
3. **Equal Opportunity:** The County intends and expects that the Contracting processes of the County and its Contractors provide equal opportunity without regard to gender, race, ethnicity, religion, age or disability and that its Contractors make available equal opportunities to the extent third parties are engaged to provide goods and services to the County as Subcontractors, Contractors, or otherwise. Accordingly, the Contractor shall not discriminate on any of the foregoing grounds in

the performance of any Agreement awarded to the Contractor, and shall make available equal opportunities to the extent third parties are engaged to provide goods and services in connection with performance of the Agreement. If submitting a joint venture proposal, or a proposal involving a partnership arrangement, articles of partnership stating each partner's responsibilities shall be furnished and submitted with the Response.

4. **Colorado Open Records Act:** All documentation submitted in response to this Solicitation will become the property of Adams County. All documentation maintained or kept by Adams County shall be subject to the Colorado Open Records Act. C.R.S. 24-72-201 *et. seq.* ("CORA"). Accordingly, respondents are discouraged from providing information that they consider confidential, privileged, and/or trade secrets as part of a response to this Solicitation. Any portions of submissions that are reasonably considered confidential should be clearly marked as such. The County does not guarantee the confidentiality of any record(s).

Careful consideration should be given before submitting confidential information to the County. The Colorado Open Records Act permits public scrutiny of most materials collected in this Solicitation process.

5. CLARIFICATION AND MODIFICATIONS IN TERMS AND CONDITIONS

- 5.1. Where there appears to be variances or conflicts between the General Terms and Conditions, any Special Terms and Conditions and the Scope of Work/Specifications outlined in this Solicitation, the Scope of Work/Specifications, and then the Special Terms and Conditions, will prevail.

- 5.1.1. If any Contractor contemplating submitting a Proposal under this Solicitation is in doubt as to the true meaning of the Scope of Work/Statement of Work or any other portion of the Solicitation, the Contractor must submit a **written request** via email for clarification to the Point of Contact listed on the Cover Sheet of this Solicitation. The Contractor submitting the request shall be responsible for ensuring that the request is received by the County prior to the deadline for submitting questions.

- 5.1.2. The County shall issue a written addendum if substantial changes which impact the technical submission of Proposals are required. A copy of such addenda will be available at the Rocky Mountain E-Purchasing System (BIDNET) website. In the event of conflict with the original Solicitation documents, addenda shall supersede to the extent specified. Subsequent addenda shall supersede prior addenda only to the extent specified.

- 5.1.3. **ADDENDUM/ADDENDA: CONTRACTOR IS RESPONSIBLE FOR OBTAINING AND ACKNOWLEDGING RECEIPT OF ALL ADDENDUM/ADDENDA POSTED ON THE ROCKY MOUNTAIN E-PURCHASING SYSTEM (BIDNET). EACH AND EVERY ADDENDUM SHALL BE SEPARATELY ACKNOWLEDGED ON THE CONTRACTOR'S STATEMENT FORM.**

5.2. PRICES CONTAINED IN PROPOSAL, DISCOUNTS, AND TAXES

5.2.1. Contractors may offer a cash discount for prompt payment. Discounts will be considered in determining the lowest net cost for the evaluation of Proposals; discounts for periods of less than twenty days, however, will not be considered in making an award. If no prompt payment discount is being offered, the Contractor shall enter a zero (0) for the percentage discount to indicate net thirty days. If the Contractor does not enter a percentage discount, it is hereby understood and agreed that the payment terms shall be net thirty (30) days, effective on the date that the County receives an accurate invoice or accepts the products, whichever is the later date. Payment is deemed to be made on the date of the mailing of the check.

5.2.2. Contractors shall not include federal, state, or local excise or sales taxes in prices offered, as the County is exempt from payment of such taxes.

5.2.2.1. Federal Identification Number: 20-1971780

5.2.2.2. State of Colorado Tax Exempt Number: 98-03569

6. SIGNING PROPOSAL AND COLLUSION

6.1. Contractor, by affixing its signature to the Proposal, certifies that its Proposal is made without previous understanding, agreement, or connection either with any persons, firms or corporations making a Proposal for the same items, or with the County. The Contractor also certifies that its Proposal is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action. To insure integrity of the County's public procurement process, all Contractors are hereby placed on notice that any and all Contractors who falsify the certifications required in conjunction with this section will be prosecuted to the fullest extent of the law.

7. PREPARATION AND SUBMISSION OF PROPOSAL

7.1. PREPARATION

7.1.1. The Proposal must be typed or legibly printed in ink. The use of erasable ink is not permitted. All corrections made by the Contractor must be initialed by the authorized agent of the Contractor.

7.1.2. Proposals must contain a manual signature of an authorized agent of the Contractor in the space provided on the Contractor's Statement form. The Contractor's Statement form in this Solicitation must be included in all Proposals. If the Contractor's authorized agent fails to sign and return this form in its Proposal, the Proposal may be invalid and may not be considered.

- 7.1.3. The County logo is trademarked and property solely of the County. Contractors do not have permission to use the County's logo on any documentation or presentation materials and to do so would be a violation of the County's trademark.
- 7.1.4. Alternate Proposals will not be considered unless expressly permitted in the Scope of Work.
- 7.1.5. The accuracy of the Proposal is the sole responsibility of the Contractor. No changes in the Proposal shall be allowed after the date and time that submission is due.

7.2. SUBMISSION

- 7.2.1. The Proposal shall be sealed in an envelope with the Contractor's name and the Solicitation title and number on the outside. The County's Pricing Form, which is attached to this Solicitation, must be used when the Contractor is submitting its Proposal. The Contractor shall not alter this form (e.g. add or modify categories for posting prices offered) unless expressly permitted in the Solicitation or in an addendum duly issued by the County. Only sealed proposals received by the Purchasing Division will be accepted; Proposals submitted by telephone, email, or facsimile machines are not acceptable.
- 7.2.2. Failure to provide any requested information may result in the rejection of the Proposal as non-responsive.
- 7.2.3. Proposal must be submitted in the format supplied and/or described by the County. Failure to submit in the format provided may be cause for rejection of the proposal.
- 7.2.4. Contractor is responsible for ensuring their Proposal is received by the Purchasing Division prior to the deadline outlined in the Solicitation regardless of the method of delivery.
- 7.2.5. Contractors, which qualify their Proposal by requiring alternate Contractual terms and conditions as a stipulation for Agreement award, must include such alternate terms and conditions in their Response. The County reserves the right to declare a Contractor's Proposal as non-responsive if any of these alternate terms and conditions is in conflict with the County's terms and conditions, or if they are not in the best interests of the County.

8. LATE PROPOSALS

- 8.1. Proposals received after the date and time set for the opening/closing shall be considered non-responsive and may be returned unopened to the Contractor.
- 8.2. The County assumes no responsibility for late deliveries of mail on behalf of the United States Post Office or any other delivery system.

- 8.3. The County assumes no responsibility for a Proposal being either opened early or improperly routed if the envelope is not clearly marked on the outside:

**EMPLOYEE SATISFACTION AND CULTURAL HEALTH SURVEY
RFP-AF-2018.019**

- 8.4. In the event of a situation severe enough to cause the Adams County Board of Commissioners to close the County offices for any reason, the Purchasing Manager has the prerogative of rescheduling the proposal opening time and date. No proposal will be considered above all other proposals by having met the proposal opening time and date requirements to the exclusion of those who were unable to present their proposal due to a situation severe enough to cause the Board of County Commissioners to close the County offices.

9. MODIFICATION AND WITHDRAWAL OF PROPOSALS

- 9.1. **MODIFICATIONS TO PROPOSALS.** Proposals may only be modified in the form of a written notice on Contractor letterhead and must be received prior to the time and date set for the Proposals to be opened. Each modification submitted to the County's Purchasing Division must have the Contractor's name and return address and the applicable Solicitation number and title clearly marked on the face of the sealed envelope. If more than one modification is submitted, the modification bearing the latest date of receipt by the County's Purchasing Division will be considered the valid modification.

9.2. WITHDRAWAL OF PROPOSALS

- 9.2.1. Proposals may be withdrawn in the form of a written notice on Contractor letterhead and must be received prior to the time and date set for the opening of Proposals. Any withdrawal of a Proposal submitted to Adams County Purchase Division must have the Contractor's name, return address, and the applicable Solicitation number and title clearly marked on the face of the envelope and on the withdrawal letter.

- 9.2.2. Proposals may not be withdrawn after the time and date set for the opening for a period of ninety calendar days. If a Proposal is withdrawn by the Contractor during this ninety-day period, the County may, at its option, suspend the Contractor and may not accept any Proposal from the Contractor for a six-month period following the withdrawal.

10. REJECTION OF PROPOSALS

- 10.1. **REJECTION OF PROPOSALS.** The County may, at its sole and absolute discretion:

- 10.1.1. Reject any and all, or parts of any or all, Proposals submitted by prospective Contractors;

10.1.2. Re-advertise this Solicitation;

10.1.3. Postpone or cancel the process;

10.1.4. Waive any irregularities in the Proposals received in conjunction with this Solicitation.

10.2. REJECTION OF A PARTICULAR PROPOSAL. In addition to any reason identified above, the County may reject a Proposal under any of the following conditions:

10.2.1. The Contractor misstates or conceals any material fact in its Proposal;

10.2.2. The Contractor's Proposal does not strictly conform to the law or the requirements of the Solicitation;

10.2.3. The Proposal expressly requires or implies a conditional award that conflicts with the method of award stipulated in the Solicitation;

10.2.4. The Proposal does not include documents, including, but not limited to, certificates, licenses, and/or samples, which are required for submission with the Proposal in accordance with the Solicitation; and/or

10.2.5. The Proposal has not been executed by the Contractor through an authorized signature on the Contractor's Statement form.

10.3. The County reserves the right to waive any irregularities or informalities, and the right to accept or reject any and all proposals.

11. ELIMINATION FROM CONSIDERATION

11.1. A Proposal may not be accepted from, nor any Agreement be awarded to, any person or firm which is in arrears to the County upon any debt or Agreement or which is a defaulter as surety or otherwise upon any obligation to the County.

11.2. A Proposal may not be accepted from, nor any Agreement awarded to, any person or firm who has failed to perform faithfully any previous Agreement with the County or other governmental entity, for a minimum period of three years after the previous Agreement was terminated for cause.

11.3. Any communications in regards to this RFP must go through the Adams County Purchasing Division only. Any contact with other County personnel or County Contractors may be cause for disqualification.

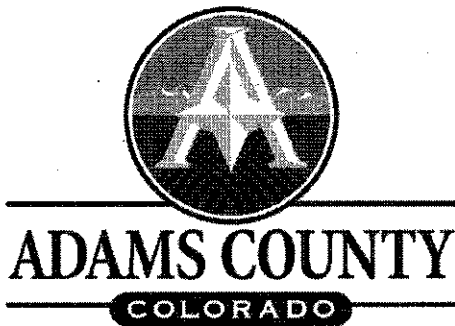
11.4. No damages shall be recoverable by any challenger as a result of the determinations listed in this Section or decisions by the County.

11.5. The Board of County Commissioners may rescind the award of any proposal within one week thereof or at its next regularly scheduled meeting; whichever is later, when the public interest will be served thereby.

12. QUALIFICATIONS OF CONTRACTOR: The County may make such investigations as deemed necessary to determine the ability of the Contractor to perform work, and the Contractor shall furnish all information and data for this purpose as the County requests. Such information includes, but is not limited to: current/maximum bonding capabilities, current licensing information, audited financial statements, history of the firm on assessments of liquidated damages, Agreements cancelled prior to completion and/or lawsuits and/or pending lawsuits against the firm and/or its principals. The County reserves the right to reject any Proposal if the evidence submitted by, or investigation of, such Contractor fails to satisfy the County that such Contractor is properly qualified to carry out the obligations of the Agreement and to complete the work contemplated therein. Conditional Proposals will not be accepted.

13. AWARD OF SOLICITATION: The County shall award this Solicitation to the successful Contractor through the issuance of a Notice of Intent to Award. All Contractors that participated in the Solicitation process will be notified of Contractor selection. No services or goods shall be provided, and no compensation shall be paid, until and unless an Agreement has been signed by an authorized representative of the County and the Contractor.

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Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

**REQUEST FOR PROPOSAL
SCOPE OF WORK**

I. INTRODUCTION

Adams County (County) is seeking proposals from qualified and experienced firms to provide services for an EMPLOYEE SATISFACTION AND CULTURAL HEALTH SURVEY.

II. REQUIRED DOCUMENTATION

Failure to provide the required information may deem your submittal non-responsive.

Items which must be included in the response/submittal in order to be accepted and evaluated:

- RFP Response/Proposal
- W-9
- Pricing Form (In separate marked and sealed envelope)
- Contractor's Certification of Compliance (Signature required)
- Contractor's Statement (Signature required)
- References Form - Three (3) recent engagements
- Vendor Information Form
- One (1) marked ORIGINAL proposal, One (1) USB or CD with a single PDF formatted proposal and three (3) paper hard copies of the proposal.

III. RESPONSE FORMAT

Failure to respond in the required format may deem your submittal non-responsive.

SUBMISSION OF PROPOSALS: ONE (1) hardcopy marked ORIGINAL, ONE (1) electronic original version (USB or CD with a single PDF formatted proposal document) and three (3) PAPER COPIES of the proposal submittal. The Proposal must be received at the time and place specified on the first page of this Solicitation. Submittals should be prepared simply and economically providing a straightforward, concise description of the Contractor's ability to perform the requirements of this Solicitation. Failure to submit the required number of copies may deem the Contractor non-responsive. **The electronic copy shall be an EXACT reproduction of the original documents provided. All sections shall be combined into a single PDF electronic document.**

PRICING MUST BE SUBMITTED IN A SEPARATE SEALED ENVELOPE. THERE MUST NOT BE ANY PRICING INFORMATION WITHIN THE HARD COPY PROPOSALS.

1. Provide Proposal submittal without reference to Adams County logo.
2. Proposal shall be in an organized and easy-to-find format.
3. Executive Summary - The executive summary should give in brief concise terms a summation of your submittal. Identify the points that make your firm uniquely qualified for this engagement.
4. Profile of the Firm (if applicable) – State whether your firm is local, national, or international.
Also include the following:
 - a. The Firm's key contact name, phone number and email address for this project. (Your Firm's "Project Manager").
 - b. Size of the firm and size of the local office.
 - c. Number and nature of the professional staff to be assigned to the project on a full-time basis.
 - d. Number and nature of staff to be assigned to this project on a part-time basis.
 - e. Identify the supervisory and management staff who will be assigned to the engagement. Provide resumes for each person that will be assigned to this engagement.
 - f. Provide any substantiated complaints against the firm in the last three (3) years and any outstanding litigation.

IV. STATEMENT AND SCOPE OF SERVICES

I. Introduction

A. Project Background

In 2016, the County conducted an employee satisfaction survey. This was undertaken in order to collect the opinions of employees regarding their job satisfaction and other key characteristics of quality work environments: communication, organizational ethics, employee fit, wages and benefits, physical space, supervisory relationships, job feedback system, professional development, and self-reported performance. The County now wishes to update the survey to measure progress and changes in employee satisfaction levels.

B. Project Objective

The County wants to offer all employees with a platform to provide direct input regarding the multitude of factors that assess the current working environment. The County wants to ensure that the voices of employees are heard so that the Executive Leadership Team and Department Directors can identify existing challenges and strategically plan for improvements. The County expects that the successful vendor will provide clear information, insights, and conclusions that are intuitive and readily actionable.

II. Scope of Services

A. Survey Design & Methodology

The County requires that the successful vendor develop a survey questionnaire that will be utilized to evaluate the satisfaction of employees across the County enterprise. While the County will, for the most part, defer to the vendor's judgment as it pertains to survey design, the vendor must keep the following points in mind:

1. Examples of the primary data points that the County would like measured in the survey minimally include: employee work group performance, employee contribution and fit, employee-supervisor relationship, employee performance evaluation, professional development opportunities (highlight training opportunities), wages and benefits, communication and decision-making, accountability, role clarity, respect and ethics, as well as physical work environment. The County also wishes to capture employee opinions on the clarity of the County's strategic direction, communication regarding County vision, values, and norms, role as an innovative organization, interdepartmental collaboration, and leadership.
2. Since the 2016 employee survey, the County has undergone several organizational changes. The vendor should develop specific questions that will provide insight to the Executive Leadership Team and Department Directors pertaining to how employees were affected and feel about these organizational changes. Questions should help measure topics including, but not limited to: how organizational changes were communicated, organizational stability, and how changes may have affected employees' future plans with the organization.
3. The County is currently in the process of developing data-driven strategies centered on people-centric metrics. In addition to the primary data points listed above, the County is interested in capturing information including but not limited to: Department (selections can be provided by the County), office location (selections can be provided by the County), employee tenure with the County (preferably a scale such as: under 1 year, 1-2 years, 3-5 years, 6-10 years, 10-15 years, 15-20 years, 20 + years), as well as additional demographic information.
4. The County would prefer that all Likert scale-based questions be forced choice, thus removing the option for employees to select "Neutral" or "I don't know."
5. For any open-ended questions included in the proposed survey, the vendor must elaborate on how they intend to capture the qualitative data associated with those questions.
6. One of the goals of the 2018 biennial Employee Satisfaction Survey is an improved response rate. 2016's survey saw a response rate of 61%. The County would like to see the response rate increase by 5% for 2018's survey. While this is not a requirement, the County is interested in the

vendor's methodological strategies for improving response rates, and would like responses to directly address this expectation.

7. The County will provide documentation pertaining to the 2016 Employee Satisfaction Survey for the vendor's reference in their analysis. The vendor is expected to use the 2016 survey as a reference and starting point for the development of the 2018 survey.
8. The vendor will prepare an outline of their survey methodology and include that documentation in their proposal for evaluation.
9. The vendor will provide a detailed timeline and implementation plan outlining all deliverables and their due dates. If any County resources are needed to successfully complete the design, the vendor should outline those requirements in the implementation plan.

B. Survey Analysis

The successful vendor will provide a comprehensive analysis of the data generated by the Employee Satisfaction Survey. The following deliverables are required upon the completion of survey:

1. Summary report of employee satisfaction that includes breakdowns of data based on points outlined in sections II.A.1 and II.A.2.
2. Ten (10) hard copies of the final draft shall be submitted to the Project Manager for review. *Once all corrections have been made and approved by the County, an additional ten (10) hard copies shall be provided by the vendor.* In addition to the final ten (10) hard copies, the summary report must be provided to the County electronically as both Microsoft Word and Adobe PDF documents.
3. The County requires that the vendor present their findings during 1-2 in-person presentations. Electronic copies of the presentation must be provided beforehand.
4. As stated in section II.A.7, the County will provide the vendor with documentation related to the 2016 Employee Satisfaction Survey. The vendor is expected to develop a strategy comparing results from 2016 and 2018 so that a comparison can be included in their final analysis.
5. The vendor's final analysis should include key insights gleaned from the survey responses as well as how the survey responses are benchmarked against national standards for public agencies.

C. Survey Data Management

All survey responses and the related data are the property of the County. Any outside utilization of the data generated by this survey is forbidden without the formal authorization of the County.

While the County requires that the vendor engages in their own analysis of survey responses, survey responses must be made available to the County in a digital and machine-readable format.

1. Machine-readable formats include: spreadsheets with header columns that can be exported as comma separated values (CSVs), JSON, and XML. The County's preference in this instance is that the data be provided via CSV, with JSON being the second choice. Machine-readable formats **do not include** Microsoft Word documents, Microsoft PowerPoint documents, or PDFs.
2. This provision can also be met by providing survey data via a RESTful API. However, if the vendor chooses this option, API documentation must be provided in their initial proposal.
 - a. Documentation must demonstrate how your API solution handles authentication, error messages, resources, terms of use, and change logs.

III. Timeline

The County expects the successful vendor to release the developed survey to County employees by the first week of October 2018.

IV. Submittal Format

The vendor shall submit a proposal that shall not exceed twenty (20) sheets, submitted only on single sided, single column typed 8.5" x 11" sized paper. The sheet count limitation applies to the actual technical specifications in the submittal. The only exceptions to the page count are the front and back cover. There is a minimum of twelve (12) point font requirement for the basic text of the entire submittal. Appendices of relevant information may supplement the proposal. The formal proposal should also include the following:

1. A document outlining the experience of the vendor proposing service. This artifact should also outline the team members, their roles, and experience (projects and dates). Indicate how much time each team member will be devoting to this project. If County staff is required for any deliverables, please clearly identify those tasks.
2. A document outlining the methods and means by which the vendor will perform the services outlined in the proposal.
3. If any portion of the project is to be subcontracted, the vendor must submit a list that includes the portion of the project that will be subcontracted, as well as the names and work experience of the subcontractor.
4. A document that serves as a formal project plan. This artifact should clearly outline deliverable due dates and responsible parties.

V. Vendor Selection Criteria

Selection of the successful vendor with whom negotiations shall commence will be made through an evaluation process based on the following criteria:

1. Project approach and methods
2. Project schedule
3. Demonstration of the project team's expertise and experience in coordinating and developing similar projects of this type and scope.
4. Demonstration of a clear understanding of the project's purpose and objective.
5. Demonstration of balance between methodological rigor and project objectives within the budget realities and needs of the County.
6. Project fee structure and cost estimate
 - a. Total project budget shall not exceed \$20,000

The County will form an Evaluation Team to review and select a vendor based on the content included in the submitted technical proposal. At the discretion of the Evaluation Team, the County may invite top-rated vendors for a follow-up interview/presentation prior to making a final selection.

End of Statement and Scope of Services

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ADAMS COUNTY
COLORADO

Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

**REQUEST FOR PROPOSAL
PRICING FORM: 2018.019
(Submit in separate sealed envelope)**

PRINT OR TYPE KEY CONTACT INFORMATION BELOW (Contractor's Project Manager):

Contractor Name

Date

Contact Person

Title

Phone

Email Address

TOTAL PROJECT PRICE:

Percentage of project performed by Subcontractor: _____%

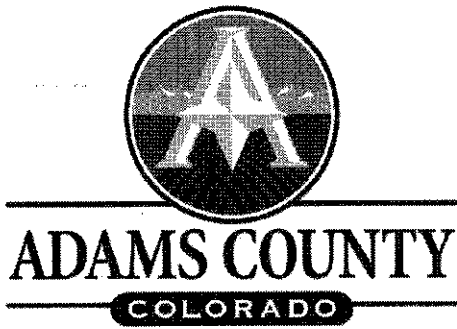
Total Fees paid to Subcontractor: \$ _____

Any other fees associated with this project:

Total Submittal Price (Firm Fixed Fee): \$ _____

Percentage of prompt payment discount, if offered: _____%

Total Submittal Price with Discount: \$ _____



Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

**REQUEST FOR PROPOSAL
CONTRACTOR'S CERTIFICATION
OF COMPLIANCE**

Pursuant to Colorado Revised Statute, § 8-17.5-101, *et. seq.*, as amended 5/13/08, as a prerequisite to entering into a Agreement for services with Adams County, Colorado, the undersigned Contractor hereby certifies that at the time of this certification, Contractor does not knowingly employ or Agreement with an illegal alien who will perform work under the attached Agreement for services and that the Contractor will participate in the E-Verify Program or Department program, as those terms are defined in C.R.S. § 8-17.5-101, *et. seq.* in order to confirm the employment eligibility of all employees who are newly hired for employment to perform work under the attached Agreement for services.

Contractor Name

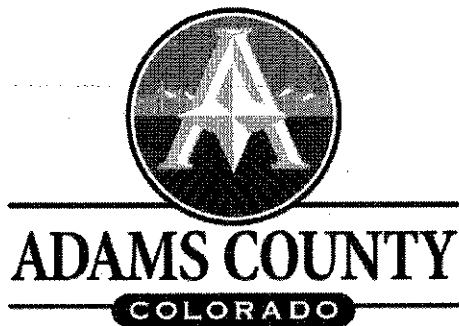
Printed or Typed Name

Signature

Title

Date

Note: Registration for the E-Verify Program can be completed at: <https://www.vis-dhs.com/employerregistration>. It is recommended that employers review the sample "memorandum of understanding" available at the website prior to registering.



Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

**REQUEST FOR PROPOSAL
CONTRACTOR'S STATEMENT**

I have read and fully understand all the conditions herein set forth in the foregoing paragraphs, and by my signature set forth hereunder, I hereby agree to comply with all said conditions as stated or implied. In consideration of the above statement, the Bid/Proposal is hereby submitted.

If any of the documents listed on the Cover Sheet are missing from this package, contact Adams County Purchasing. If you require additional information, call the contact person named on the Cover Sheet.

The undersigned hereby affirms that (1) he/she is a duly authorized agent of the Contractor, (2) he/she has read all terms and conditions and technical specifications which were made available in conjunction with this Solicitation and fully understands and accepts them unless specific variations have been expressly listed in his/her Bid/Proposal, (3) the Contractor will accept any awards made to it as a result of the Bid/Proposal submitted herein for a minimum of 120 calendar days following the date of submission.

WE, THE UNDERSIGNED, HEREBY ACKNOWLEDGE RECEIPT OF ADDENDA:

(List addendum numbers separately): _____

Contractor Name Date

Authorized Signature Printed Name

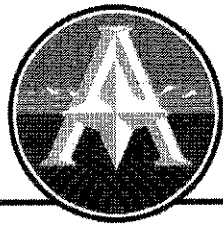
Title

Address

City, State, Zip Code County

Telephone Fax

Email



ADAMS COUNTY
COLORADO

Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

**REQUEST FOR PROPOSAL
REFERENCE FORM**

1. Company Name

Address

Contact Name & Phone

Contact Email Address

Project Name

Project Date & \$ Value

2. Company Name

Address

Contact Name & Phone

Contact Email Address

Project Name

Project Date & \$ Value

3. Company Name

Address

Contact Name & Phone

Contact Email Address

Project Name

Project Date & \$ Value

EXHIBIT "A"

ORIGINAL PROPOSAL:

Adams County Employee Satisfaction and Cultural Health Survey

RFP-AF-2018.019

May 16, 2018

Proposal Prepared By:



525 N. Tejon Street, Colorado Springs, CO 80903

Office - (719) 590 – 9999

Joey@elevatedinsights.com

www.ElevatedInsights.com

Note: Elevated Insights is a 2013 dba for Balch Consulting, a 100% female-owned, S-corp registered in the state of Colorado since 2000.

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I. Introduction

A. Executive Summary

Satisfied and engaged employees are the backbone of any organization. Sybil Stershic, an author and expert in workplace engagement says “The way your employees feel is the way your customers will feel”. For Adams County, the way your employees feel is the way the Adams County community will feel. And when your mission is *to responsibly serve the Adams County community with integrity and innovation*, the importance of satisfied and engaged employees is amplified.

But keeping employees satisfied is not always easy, especially in today’s ever-fluid workforce. The Business and Professional Women’s Foundation estimates that Millennials will comprise 75% of the global workforce by 2025, and EI research has indicated that the workplace factors driving Millennial employee satisfaction, engagement and retention are markedly different than what older generations have valued. Perhaps the biggest mistake organizations make is assuming they know which workplace factors lead to a healthy culture. They will ask employees to rate their satisfaction in a variety of common workplace areas, but the results only tell half the story. Organizations often waste time and money working to improve workplace factors that simply aren’t that important to employees.

Elevated Insights’ (EI’s) approach to employee engagement, satisfaction and cultural health is data-driven and custom. We don’t pretend to know what leads to satisfied employees and a healthy culture, we let the employee responses direct us. So, in addition to measuring satisfaction of a variety of workplace factors, we quantify the importance of each factor tested by measuring the correlation it has with key measures of employee health. Which workplace factors are driving overall satisfaction, engagement and likelihood to be with the organization in 5-10 years? EI will answer this for you. Understanding the relative importance of each workplace factor is imperative to improving the cultural health of an organization.

EI also knows that there is no secret sauce when it comes to employee engagement; every organization is different. In fact, different groups of people within the same organization often have very different levels of satisfaction and care about different workplace factors. Adams County knows this, stating in the Scope of Services that it’s “in the process of developing data-driven strategies based on people-centric metrics”. This is absolutely the right path forward, especially for an organization like Adams County that has such a diverse workforce. EI will thoroughly analyze the data on a subgroup level, so that you can improve workplace factors for the departments and demographics that value those factors.

Lastly, Elevated Insights is not simply a research company, we’re consultants in the truest form. We won’t leave you with the results and the burden of deciding how to move forward. We’ll tediously analyze the data and propose recommendations that are thoughtful and strategic, as

if it was our own organization. The following proposal dives deep into EI's methodology and the variety of ways we plan on going above and beyond. Adams County deserves a partner that provides much more than a standard, "off-the-shelf" employee satisfaction and cultural health study. Elevated Insights can be trusted to provide you with findings that are comprehensive, unbiased and personalized, and recommendations that are clear, actionable and data-driven.

B. Who is Elevated Insights?

Elevated Insights is a custom, turn-key marketing research firm located in Colorado Springs, Colorado. We help companies in the US and global markets better understand their target consumers, employees, or constituents to uncover unmet needs, operate more effectively, and bring new services and products to the market. Our team has 12 full-time members and 5 part time members. Our office doubles as a state-of-the-art focus group facility that was finished a little less than 3 years ago.

Our clients and their consumers span multiple industries - advertising agencies, apparel, food & beverages, consumer products, beauty care, skin care, restaurants, health & wellness, spirits/alcoholic beverages, insurance, investments, banking, government, non-profits and the military.

- For client endorsements, please see Section IV.A.
- For an example of a very similar employee satisfaction study we conducted, please see Section IV.B.
- For information on the professional staff that will be assigned to this project, please see Section IV.C.

Note: Elevated Insights is a 2013 dba for Balch Consulting, a 100% female-owned, S-corp registered in the state of Colorado since 2000.

C. Project Manager and Contact for Elevated Insights

Joey Torretto will be the point of contact and project manager for this Adams County study. Joey has been with Elevated Insights for 4 years and is the head of EI's quantitative research division. A knowledgeable analyst with experience using a variety of survey designs and analytical techniques, Joey regularly manages turn-key research projects for fortune 500 companies such as USAA and Frito-Lay. Last year, Joey managed a turn-key employee satisfaction and engagement study for Transportation Technology Center, Inc. (TTCI), a company in Pueblo, Colorado. Parallels between TTCI's goals and Adams County's goals certainly exist, and Joey is excited to combine that recent experience with the many other research projects he has conducted to help Adams County improve their employee satisfaction and cultural health.

Joey Torretto
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joey@elevatedinsights.com

D. Project Background and Objective (Directly from Request For Proposal)

1. Project Background

In 2016, the County conducted an employee satisfaction survey. This was undertaken in order to collect the opinions of employees regarding their job satisfaction and other key characteristics of quality work environments: communication, organizational ethics, employee fit, wages and benefits, physical space, supervisory relationships, job feedback system, professional development, and self-reported performance. The County now wishes to update the survey to measure progress and changes in employee satisfaction levels.

2. Project Objective

The County wants to offer all employees with a platform to provide direct input regarding the multitude of factors that assess the current working environment. The County wants to ensure that the voices of employees are heard so that the Executive Leadership Team and Department Directors can identify existing challenges and strategically plan for improvements. The County expects that the successful vendor will provide clear information, insights, and conclusions that are intuitive and readily actionable.

II. Methodology

A. Survey Development and Design

1. Initial Meetings/Planning

Elevated Insights will start by meeting with Adams County representatives in an effort to comprehensively understand the goals of the research to be conducted. EI will also ask for details about the organization's structure, operations, employee makeup and plans for the future. A comprehensive understanding of the organization will allow EI to custom craft a questionnaire that is uniquely tailored to Adams County.

2. Survey Development/Design

First, EI will thoroughly review the 2016 survey questionnaire and results. This survey will serve as a starting point for development of the 2018 survey. Any questions/topics that Adams County representatives would like to measure change in will be included in the exact same format to reduce any bias. In addition to desired questions from 2016, the 2018 survey will include:

- Questions that measure sentiment in the following areas: employee work group performance, employee contribution and fit, employee-supervisor relationship, employee performance evaluation, professional development opportunities (highlight training opportunities), wages and benefits, communication and decision-making, accountability, role clarity, respect and ethics, as well as physical work environment.
- Questions that gauge employee thoughts and opinions around the following: clarity of the County's strategic direction, communication regarding County vision, values, and norms, role as an innovative organization, interdepartmental collaboration, and leadership.
- Questions that will be used for benchmarking against national standards for public agencies (The Best Places to Work in the Federal Government® rankings or any other comparison Adams County would like to make)
- Questions that measure employee opinion around recent organizational changes:
 - How said changes were communicated
 - How the changes have influenced future plans with the organization
 - Stability of the organization in the minds of employees
- A multitude of overall satisfaction/cultural health/retention measurements. For example:
 - How likely is it that you will be working for Adams County in 5 years? (10 pt. scale)
 - Why? (open-end)
 - Overall, how satisfied are you in working for Adams County? (10 pt. scale)
 - Why? (open-end)
- Open-ended questions that ask employees what they would like to see changed/improved by the organization.
- Demographic information such as age, gender, department, tenure, locations, etc. EI will work with Adams County to develop this list of demographic-based information. These pieces of demographic information will be used in the analysis phase to identify key differences in opinion by subgroup. Per the RFP, EI will also look for Adams County to provide selections for certain questions that are specific to the organization (e.g. departments), and useful to the organization's leadership.

- Department specific questions (if desired) for larger departments. An organization like Adams county has employees in a variety of jobs and from all walks of life. If Adams County representatives would like to ask specific groups of employees questions, EI can program this via survey logic (details in Section II.2.4 below).

3. Question Design Details

- Wherever possible, questions will be asked on a 5-10 pt. scale that forces employees to lean one way or the other (no neutral or I don't know option). These rating-type scales will prove very important in our survey analysis.
- Up to 5 open-ended questions will be included. Which questions will be included as open-ends can be discussed, but EI recommends asking questions that Adams County does not think it can provide collectively exhaustive answer choices to. Open-ended questions can be incredibly valuable in the sense that answer choices are unaided, but the variety of responses can make analysis tricky at times. EI deals with this conundrum all the time and have developed a system of coding: The responses to each open-ended question will be read by an EI analyst and then categorized based on the overall premise of the response. This categorization allows EI to include the open-ended responses in the breakout analysis (so that subgroup differences can be analyzed). In reading through each open-end, analysts will also pull out the best quotes to be used in analysis/reporting.
- All questions will be carefully written to ensure they are not leading, biased, or confusing. EI has extensive experience in survey design and can identify any potential issues before finalizing the survey.
- Adams County representatives are welcome to be as involved as they would like in the development of the survey. EI is used to an iterative process, where clients are encouraged to provide feedback to survey drafts that ultimately lead to a very custom survey based on the organization's goals and nuances.
- An identical version of the survey can be produced in Spanish to accommodate Spanish speaking employees. Austin McCown (see Section IV.B.4 for background) is fluent in Spanish and will be able to translate the survey. Care will be taken to ensure questions are asked colloquially (not just plugged into a translate widget).

4. Survey Programming

After a final survey has been agreed upon, it will be programmed into our secure online survey platform: Qualtrics.com. From a design perspective the, survey will:

- Be engaging – our platform has a variety of question types like slider scales, drag and drop, star ratings and drop-down selections. These types of questions make the survey more fun, easier and less like a test. Being able to hold the attention of

employees will be imperative in making sure questions/choices are read completely, and answers are honest and thoughtful.

- Use survey-logic – this makes sure that only relevant questions are shown to each employee. For example: if you would like to ask employees working in law enforcement something that would not apply to other jobs, we can ensure only employees in law enforcement see the question(s).
- Feature randomization – Answer choices and questions can both be randomized for each employee who takes the survey. Depending on the question and survey, this can significantly reduce response bias.
- Be mobile-friendly and work on any operating system/web browser – The survey will be fully optimized and formatted for taking on mobile devices. Thus, employees will be able to take the survey on a desktop, laptop, tablet or smartphone. The operating system and browser used on that device should not matter either.
- Be tested thoroughly on multiple devices before being sent to employees – we will ensure logic is setup correctly and there are no errors.

Before sending the survey to employees, Adams County will have an opportunity to test the online survey and instruct EI to make any desired changes.

B. Survey Communication and Distribution

1. Survey Communication

Elevated Insights will work with Adams County representatives to craft communication that leadership/management can use to promote the employee satisfaction survey internally. Communication should feature:

- The anonymity of the survey – this is a huge catalyst for both response rates and honest answers. It's important that employees understand that Adams County will never see any individual survey responses, they will only see results that represent populations of employees. In addition, EI will collect and house all of the data, and Adams County representatives will not have access to individual responses.
- The goal of the survey – the project objective from the RFP is included in Section I.D.2. Filling Employees in on that mission will help motivate employees to respond and provide honest feedback.

2. Survey Distribution and Collection

Elevated Insights will look for Adams County to provide employee email addresses. This will be the primary method of survey distribution. The emailed survey invitation will

reiterate the communication features above, provide a forum to ask any questions about anonymity or how the results will be used, and a link to the survey. This link will take the employees to the survey webpage regardless of what device they are on (desktop, laptop, tablet or smartphone). EI will also send reminders to employees who have not taken the survey 1 week after its initial release.

*Addendum One notes that there are approximately 200-300 employees that do not have regular access to computer. For this subset of employees, we have a few alternatives:

- Text message with survey invite – this would obviously require Adams County to provide cell phone numbers for this subset of employees. The text would include a link to the survey just like the email. The employee would also receive the communication details that will be in the email, either in the text itself, or before taking the survey at the top of the webpage (the latter if we are limited by text-message character limitations).
- Onsite visit – If there are certain locations or jobsites that host the majority of employees without email/computer access, EI could come onsite and administer the survey via tablets. We have 50 mobile tablets that would allow 50 employees to take the survey at once. This alternative does have a small added cost (see pricing form)
- Paper surveys – these could be either mailed to employees or distributed by managers. The first page would include all of the same communication details. After filling out the survey, employees would then have to mail the survey to Elevated Insights. Managers could also collect the surveys and then mail to Elevated Insights in bulk, but we don't recommend this as the true anonymity of the process could face doubt.

3. Improving Response Rates

The RFP references the project goal of increasing response rates by 5%. EI feels this can be accomplished by the combination of the following features already mentioned:

- Engaging Survey Design – this should limit the number of employees that stop taking the survey as a result of boredom/length
- The survey will be mobile-friendly and work on any operating system or web browser – this means the survey can be taken on whatever device is most convenient for them (or whatever device they first see the email on). In addition, no responses will be lost due to a lack of compatibility between OS/web browser and survey platform

- Anonymity will be stressed – this can go a long way in settling fears about providing opinions about the organization
- Promotion by leadership/management
- Sharing the collective goal of the survey process (buy-in)
- Alternative methods of response collection
- Reminder emails sent to employees who have not taken the survey after 1 week

4. Data Cleaning

Data quality is a passion area for Elevated Insights. EI has given presentations to fortune 500 companies on its importance, and the same standards will be applied to this work for Adams County. EI analysts will look through the data for things like:

- Incomplete responses
- Unrealistic time taken on the survey (if an employee took the whole survey in a couple minutes it's obvious they were not reading the questions)
- Straight-lining (answering the same number for all Likert scales)

This data cleaning process ensures that inattentive responses do not bias the results in any way.

C. Survey Analysis

1. Crosstabulation and Statistical Significance Testing

EI will then use a statistical analysis platform to create crosstabs of the data. This will be used in EI's analysis and delivered to Adams County upon project completion (see Appendix, Section C, for a screenshot of what this will look like and some of it's features).

The crosstab data will primarily be used to spot statistically significant differences between subgroups. The statistical significance testing can be done at any confidence interval Adams County would like, but EI can also make recommendations here. There is no limit on the number of breakouts you would like to see.

2. Analyzing Satisfaction ratings for all workplace factors

All of the workplace factors tested will be comprehensively analyzed and charted visually for easy digestion. The areas where Adams County is excelling and struggling will be clear. This data will then be combined with important measures (next Section) for a comprehensive analysis that will inform reporting and recommendations

3. Deriving the Importance of Workplace Factors

In our opinion, a good employee satisfaction study should not just provide analysis in terms of which factors employees are satisfied with, it should also provide insight into which factors are most important to employees. For example, employees could say the quality of pens available at work is fantastic. But do fantastic pens have any impact on overall employee satisfaction, retention, happiness, etc.? The factors that influence satisfaction are different for every organization, and thus, we think it's imperative that we understand what is going to make the biggest difference to the employees of Adams County. We have also experienced that the factors Millennials care about are often markedly different than what older generations have valued in the past, and The Business and Professional Women's Foundation estimates that Millennial will comprise 75% of the global workforce by 2025.

To derive which factors are most important to employees, EI will measure the correlation between individual factors and broad measures (such as overall satisfaction, retention, happiness, etc.). To use the same pen example: If the same employees who rated the quality of pens highly were also very likely to be satisfied with the organization in general (and vice versa), then the data would show a correlation between pen quality and overall satisfaction, making it an important factor and one that should be focused on (please see appendix, Section B, for an example of how this relationship will be displayed).

4. Comparing 2016 Data to 2018 Data

First, Elevated Insights will chart the change between 2016 data and 2018 data for questions that were carried over (discussed in Section II.A.2). And if there are questions going back prior to 2016, those can be included in the charting as well. Then, the 2016 and 2018 data will be compared more broadly via categories or themes of satisfaction/ratings. Any areas where organizational changes happened between 2016 and 2018 will be important areas of analysis as well.

5. Benchmarking Survey Results Against National Standards

Since specific questions were included in the survey that are asked broadly across public agencies, it will be easy to benchmark/index these particular answers against broad national sentiment. In addition, EI will look for other less conventional means of comparing Adams County results to other public agencies, like looking at the top performers across the nation and seeing why they have such high satisfaction scores.

6. Coding Open-ended Responses

As mentioned in Section II.A.3, EI codes open-ended responses by categorizing each response. The resulting data is formatted in a way that can be analyzed like a standard multiple-choice question (i.e. 25% of people said the main thing they would change

about their workplace is the pen quality). Our coding process also allows for the open-ended data to be cross-tabulated so that subgroups can be analyzed (i.e. Millennials are more likely to list pen quality as the most important thing to change as opposed to Gen-Xers). (See Appendix, Section A, for an example of this process.

D. Deliverables

1. Summary Report

Elevated Insights will provide Adams County with a summary report that leverages all of the analyses laid out above. EI knows that certain Adams County leaders may want more detail than others when it comes to understanding the study's findings. To accommodate this, the summary report will seek to combine brevity with a comprehensive look at all of the factors measured and analytical techniques conducted. EI will do this by separating the report into two main Sections.

- The 1st Section of this report will paint a picture of employee satisfaction and cultural health from a macro perspective. This will likely be most useful for Adams County leadership that would like to understand where the organization is at, but don't need all of the details. This Section will include:
 - Broad ratings (overall satisfaction, retention, happiness, etc.)
 - Brief look at key work-life factors (based on satisfaction and importance)
 - Indexed performance against national public agency benchmarks
 - Change between 2016 and 2018 employee sentiment
 - High-level recommendations
- The 2nd Section of the report will "dive deep" into the findings. This will likely be most useful for the individuals tasked with implementing any necessary changes to the organization to improve satisfaction and cultural health. This will include the following insights:
 - A particular focus on the data points laid out in Section IV.II.A (bullets 1 and 2)
 - Satisfaction ratings for all work-life factors
 - Importance ratings for all work-life factors (correlation measures)
 - Performance against national public agency for each available question
 - Question-level comparison between 2016 and 2018 data
 - Notable differences in sentiment by demographic subgroups (age, gender, department, tenure, etc.)
 - Full key-findings and recommendations

Per the RFP, 10 hard copies of this summary report will be submitted to the project manager for review. Once all corrections have been made and approved by the County,

an additional 10 hard copies will be provided. In addition to the hard copies, EI will provide the summary report via in both Word and PDF formats.

2. Presentation

Elevated Insights will come to Adams county for 2 onsite presentations (assuming a 2nd is desired). EI will present a PowerPoint that has key information from the summary report, along with more visual representations. If it's helpful, EI can frame the two presentations to match the 2 parts of the summary report above:

1. One presentation would be more brief and high-level
2. The second would be more detailed for representatives who will be implementing some of the changes

Adams County will receive electronic copies of any PowerPoints to be presented beforehand.

3. Infographic

Elevated Insights will provide a one-page, infographic visual that quickly and visually summarizes the key points from the employee satisfaction study. Infographics can be a useful way to share key insights to individuals throughout the company.

4. Crosstabs

As discussed in Section II.C.1, crosstabs will show differences by demographic groups. These differences will be tested for statistical significance at a confidence level to be determined. The crosstabs will be delivered via a Microsoft Excel Workbook. The 1st Tab will have hyperlinks that take you straight to each question's data, this makes navigation much easier. (Please see Appendix, Section C, for an example of how this will work)

5. Data

Per the RFP, survey responses will be provided via Excel/CSV. Each column will be a question, and each row will be a response/employee. This format will be machine-readable.

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III. Formal Project Plan

The following is a formal project plan that outlines the timeline and due dates associated with this study. Due dates associated with each step of the timeline are explained below the table. For a comprehensive explanation of each step, please refer to the Methodology portion of the proposal (Section II).

A. High-level Timeline

Please note: the following timeline was created with the assumption that “releasing the developed survey to County employees by the first week of October 2018” (per RFP) is an ideal time of distribution, rather than a deadline. Therefore, the timeline below plans on releasing the survey in late September. If you would like to release the survey earlier than this, Elevated Insights would be happy to provide an updated (and shorter) timeline. EI is used to working under tight deadlines. In general, it’s safe to assume that the entire project can be completed 8-10 weeks after project approval (initial meetings to summary report delivery and presentations).

	July	Aug.	September				October					November		
			Wk. of Sep. 3 rd	Wk. of Sep. 10 th	Wk. of Sep. 17 th	Wk. of Sep. 24 th	Wk. of Oct. 1 st	Wk. of Oct. 8 th	Wk. of Oct. 15 th	Wk. of Oct. 22 nd	Wk. of Oct. 29 th	Wk. of Nov. 5 th	Wk. of Nov. 12 th	Wk. of Nov. 19 th
Initial Planning Meeting														
Survey Design														
Survey Programming														
Response Collection														
Data Cleaning														
Data Analysis and Reporting														
Revise Summary Report (per County’s changes)														
Final Report Delivery and In-Person Presentation(s)														
Infographic Development and Delivery (if desired)														

B. Detailed Timeline

1. Initial Planning Meeting

Elevated Insights will start by meeting with Adams County representatives (via WebEx or in-person if preferred) in an effort to comprehensively understand the goals of the research to be conducted. EI will also ask for details about the organization's structure, operations, employee makeup and plans for the future. A comprehensive understanding of the organization will allow EI to custom craft a questionnaire that is uniquely tailored to Adams County.

- *This will happen at a TBD date in July or August, based on when it makes the most sense for Adams County.*

2. Survey Design

EI will work with Adams County representatives to craft a survey that is unique to the goals and nuances of the organization. (Please see Section II.A for details on questions to be included and survey design)

- *The survey will be designed in late August and the first 2 weeks of September.*
- *A rough draft of the survey will be sent to Adams County by Friday, August 31st.*
- *The first two weeks of September will provide an opportunity for survey iterations (Adams County providing feedback and EI making changes). The survey will be finalized by Friday, September 14th.*

3. Survey Programming

Once the content and design of the survey is agreed upon, EI will program the survey into it's secure online survey platform. The survey will be engaging and work on any device (including mobile) or operating system. (Details in Section II.A.4)

- *A link to the online survey will be provided to Adams County by Tuesday, September 18th.*
- *Adams County will have the opportunity to test the survey and provide any necessary feedback/changes. The programmed survey will be finalized by Friday, September 21st.*

4. Response Collection

Elevated Insights will be distributing the survey primarily through email. There are also supplemental methods of survey distribution for employees that do not regularly access

email (please see Section II.B.2 for details). Employees will have a total of 3 weeks to take the survey.

- *Elevated Insights will send the survey to Adams County employees on Monday, September 24th.*
- *On Monday, October 1st, a reminder will be sent to employees who have not taken the survey yet. (we can also do a 3rd reminder if Adams County would like)*
- *On Monday, October 8th, response collection will close.*

5. Data Cleaning

EI is committed to data quality and has given presentations in front of many corporate clients on the topic. The responses collected will be combed through to identify responses that are incomplete or inattentive.

- *The data will be cleaned by Monday, October 8th.*
- *Cleaned data can be sent to Adams County by Wednesday, October 10th (if desired)*

6. Data Analysis and Reporting

EI will spend 4 weeks thoroughly analyzing the survey data. In addition to assessing the ratings of each workplace factor measured, EI will conduct the following analyses. (For details on these processes, see Section II.C)

- *Coding all open-ended responses*
- *Crosstabulation and Statistical Significance Testing*
- *Deriving the Importance of Workplace Factors*
- *Comparing 2016 Data to 2018 Data*
- *Benchmarking Survey Results Against National Standards*

EI will then use these analyses to create a summary report (with two parts). (Please see Section II.D.2 for details).

7. Report Delivery and Revisions

- *10 hard copies of the summary report final draft will be delivered to Adams County no later than Friday, November 2nd.*
- *The next week will provide an opportunity for Adams County representatives to provide feedback and changes to the summary report. A final report will be sent to Adams County no later than Monday, November 12th. Once it is approved, 10 final hard copies of the summary report will be delivered along with electronic Word and PDF versions.*
- *On Monday, November 12th, EI will also provide Adams County with the crosstabs (these will be in an easy-to-navigate Excel workbook, see Appendix, Section C, for details)*

8. In-Person Presentation(s)

Elevated Insights will come to Adams county for 2 onsite presentations (assuming a 2nd is desired). EI will present a PowerPoint that has key information from the summary report, along with more visual representations.

- Electronic copies of the presentation will be finalized and sent to Adams County by Monday, November 12th.
- In-person presentation(s) will be scheduled at TBD dates/times during the week of Monday, November 12th.

9. Infographic Creation and Delivery

After the presentations, EI will work with Adams County representatives to create an infographic. This is a one-page visual representation of the key findings that is easy to digest. This could be shared with leadership, placed on walls for continued consumption or shared throughout the company. We do this after the presentations to ensure we include the most useful bits of information on the infographic for its specific use in the company. However, we can develop before the presentation is guidance is given after the final draft of the summary report is delivered.

- *Infographic visual will be delivered by Friday, November 23rd.*

IV. Vendor Experience and Staff to be Assigned to Project

A. Vendor Experience

1. Endorsements

Elevated Insights has a diverse client-base spanning a variety of industries. Companies big and small trust EI to uncover insights that will ultimately improve their organizations. Here are some testimonials:

"E.I. demonstrates true partnership for all aspects of research projects including superior study design, cutting edge data collection techniques, and impactful analyses and recommendations. They are always in my consideration set when I need have a need to conduct strategic research, and I have called on their services at each organization where I have worked." - Toni Carpenter, Director, Consumer Insights at Brinker

"It has been our sincere pleasure to have worked with Elevated Insights in several capacities over the past eight years. They have a professional energy that is not only inspiring, but is contagious to everyone they come in contact with." - Jim Wyss, President at Integrity Bank & Trust

*"Elevated Insights has inspired numerous project teams at (Fortune 500 Company) with their extensive ethnographic work on Millennials' and Generation Z's use of mobile technologies."
- Director of Research, Fortune 500 Client*

2. Study of Similar Scope: TTCI Employee Satisfaction Study – Spring of 2017

TTCI stands for Transportation Technology Center Inc. Sitting on 21 sq. miles in Northeast Pueblo, the organization is a wholly owned subsidiary of the Association of American Railroads and is one of the leaders in transportation research and testing.

In 2017, Elevated Insights crafted an employee satisfaction and engagement study tailored to their unique challenges. EI brought 50 tablets onsite and received responses from 200+ employees. The data was then thoroughly analyzed, reported, and presented to TTCI with actionable recommendations that they are now implementing.

This project is obviously similar to the study in this proposal because it involves employee satisfaction, but the parallels run deeper. TTCI has a very diverse workforce, from highly paid scientists and engineers to blue-collar mechanics. Adams County is perhaps even more diverse, and the county needs a partner that understands how important that diversity is as context throughout the research process.

B. Professional Staff Who Will Work on This Project

4 EI employees will be involved with this project, including our founder/President Debbie Balch.

**Please note: time estimates are rough projections and are only meant to express the commitment our staff will have to this project. Time estimates represent total time to be allocated (if Employee A spends 50% of their time on a project over 8 weeks, we could consider that 4 weeks of their time). EI specializes in Turn-key research, so once the project starts, providing research with excellence is the only thing that matters. Adams County will never be charged any hourly rate for differences in estimated vs. actual hours.*

1. Joey Torretto – Lead Analyst and Quantitative Division Head (Project Role: Project Lead & Point of Contact with an estimated 4 weeks of time devoted)

Joey Torretto will be the point of contact and project manager for this Adams County study. Joey has been with Elevated Insights for 4 years and is the head of EI's quantitative research division. A knowledgeable analyst with experience using a variety of survey designs and analytical techniques, Joey regularly manages turn-key research projects for fortune 500 companies such as USAA and Frito-Lay. Last year, Joey managed a turn-key employee

satisfaction and engagement study for Transportation Technology Center, Inc. (TTCI), a company in Pueblo, Colorado. Parallels between TTCI's goals and Adams County's goals certainly exist, and Joey is excited to combine that recent experience with the many other research projects he has conducted to help Adams County improve their employee satisfaction and cultural health. Once this project starts it will be Joey's top priority, and he'll be involved in every step of the process. The equivalent of 4 full weeks of his time has been budgeted for. Recent projects managed:

- TTCI Employee Satisfaction and Engagement Study (2017) – (referenced in Section IV.A.2)
- USAA Member Benefits Exploration Study (2018)
- Frito-Lay Millennial Understanding Study (2017)

2. Debbie Balch – President & CEO (Proposed Project Role: Executive Consultant with an estimated 3 days of time devoted):

Debbie Balch started Elevated Insights and manages the firm. Debbie has 30+ years of experience in the market research industry. Early in her career, she worked for corporations like Procter & Gamble and PepsiCo. She then decided to leave corporate America and start her own research and insights agency. After managing research projects out of her home for 12 years, Debbie decided to expand the business and hire employees in 2012. Since 2012, she has grown the firm to support XX full time employees and renovated a downtown Colorado Springs building to become the city's first state-of-the-art focus group facility (which is also EI's office). Debbie is still involved in just about every project, and she will be devoting even more time than average to this Adams County project. Debbie's research experience in conducting employee satisfaction and engagement studies will be helpful, but she also knows a thing or two about putting these findings into practice. In 2017, Elevated Insights was named one of the best places to work in Colorado Springs by the Gazette. Debbie will take an advisory role on this project and will focus on helping with the final analysis and recommendations that will be made to Adams County. 3 full days of Debbie's time has been budgeted for.

3. Jessie Rosenberger – Research Manager & Consultant (Project Role: Project Assistant with an estimated 2 weeks of time devoted)

Jessie has been with EI for a little more than a year and has excelled in every project she has been a part of. Jessie is typically a project manager, but she will be assisting with this project alongside Joey in an effort to provide Adams County with the highest quality research possible. With a Bachelor's degree in Psychology, a certificate in Research Analysis, and a CMRP (certified market research professional) designation, Jessie has led several successful projects from inception to delivery. She continues to provide passion and drive in developing surveys and discussion guides to best get at underlying influencers, behaviors,

and attitudes. The equivalent of 2 full weeks of Jessie's time has been budgeted for. Recent projects managed:

- USAA Trust Services Research (2018)
- Laramar Local Resident Understanding (2017)
- USAA NPC Research (2017)

4. Austin McCown – Research Assistant (Project Role: Spanish Translation and Analysis with an estimated 3 days of time devoted)

Austin has been with the team for over 2 years and wears many hats. Mainly, he hosts client visits to our research facility, and assists in EI's research initiatives whenever Spanish speakers will be involved. Austin has a Bachelors degree in both International Business/Economics and Spanish Language and Literature. He even taught English in Spain while in college. Austin will help translate the survey to Spanish in a way that is conversational/colloquial and reduces any bias across the different languages. He will also help analyze the open-ended Spanish responses that are gathered. 3 days of Austin's time has been budgeted for. Recent projects managed:

Appendix

A. Open-ended Coding Example

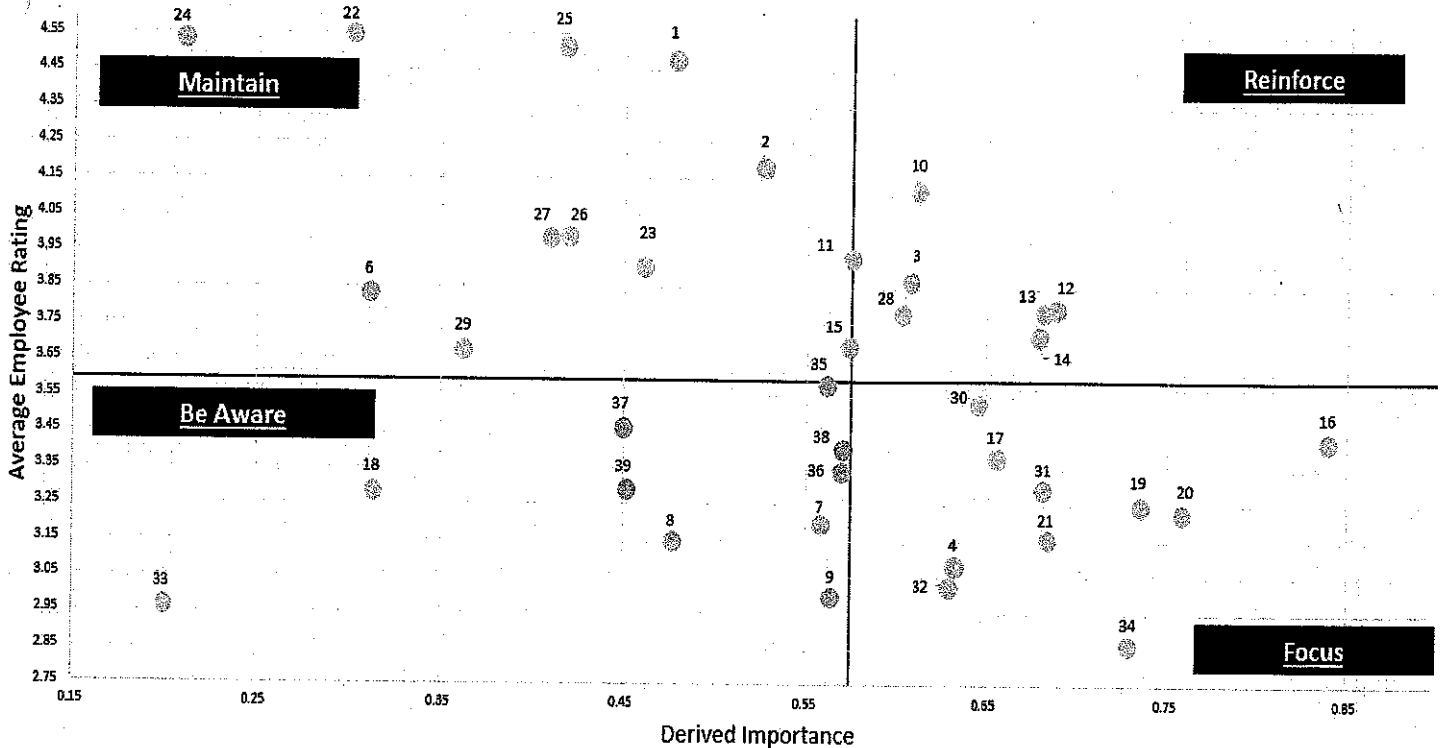
ResponseID	"If you could change one thing about working in Adams County, what would it be?"	Code 1	Code 2	Code 3
1	There is little opportunity for advancement and I wish they provided better benefits.	1	2	
2	Not paid enough for the work I do and no chance of advancing my career here.	3	1	
3	I would change the work environment. I didn't feel very welcomed by my co-workers.	4		
4	I wish they would provide better training, more benefits and more opportunity to advance in my career.	5	2	1
5	I didn't feel there was much opportunity to advance and the workplace was unpleasant.	1	4	

<u>Code</u>	<u>Code Description</u>	<u>Total Mentions:</u>	<u>% of Respondents</u>
1	Lack of advancement opportunity	4	80%
2	Better/More Benefits	2	40%
3	Better pay	1	20%
4	Better/more welcoming work environment	2	40%
5	More/Better Training	1	20%

The first screenshot above shows open-ended responses and "code" columns that we added to the right. In this fictitious example we are coding employee answers to what they would change about their workplace.

The 2nd screenshot shows the results of this coding. Among these 5 employees, lack of advancement opportunity is the thing they would change. As mentioned in the proposal, the format of the first screenshot can be used to produce cross-tabulations for subgroup comparisons.

B. Quadrant Analysis (Importance X Satisfaction)



This is a quadrant map showing different workplace factors. For this example, let's assume the correlations were ran so that we could see which workplace factors have the biggest impact on overall employee satisfaction.

- The X Axis represents the workplace factor's importance (how much of an impact does it have on overall satisfaction)
- The Y Axis represents the average satisfaction score for each workplace factor (out of 5)

By charting the workplace factors in this way, we can key-in on important groups (quadrants):

Focus – These workplace factors are important to employees, but satisfaction is lower than average. These are workplace factors that should be important to focus on

Be Aware – Although these items are less important to overall employee satisfaction, satisfaction in this quadrant is lower than average. These might become important to employees in the future (today's workforce is ever-fluid), but they are less of a priority.

Reinforce – This quadrant represents an organization's strengths. The factors in this quadrant have high importance and employee satisfaction for factors in this quadrant are higher than average.

Maintain – Items in this quadrant have low importance, but employee satisfaction with these items is higher than average. This doesn't necessarily mean these things don't matter, they are just less important and the company is performing well, meaning other factors should likely be the priority,

C. Crosstab Example

What is your gender?	Total Total (A)	Colorado Springs Segmentation					Central (T1)	What is your gender?	Political View		
		North (P1)	East (Q1)	West (R1)	South (S1)	Liberal (U)			Moderate/Not Sure (V)	Conservative (W)	
Sample Size	1,009	281	161	133	147	286	Sample Size	293	421	295	
Male	48%	53%	45%	49%	44%	47%	Male	41%	48%	55%	
Female	52%	46%	55%	51%	56%	53%	Female	59%	52%	44%	
Other	0%	1%	0%	0%	0%	0%	Other	1%	0%	1%	

The Crosstabs will be delivered in an Excel Workbook.

Every question will have hyperlinks that take you straight to the corresponding crosstab.

Demographics	
1	What is your gender?
2	What year were you born in?
3	We understand that nowadays there are lots of different ways that people "work". Which of the following apply to you? (s
4	Do you work in any of the following industries? If your job has to do with more than one of these, please select all that ap
5	Please select which range below best describes your total household income:
6	What is the highest level of education you have completed?
7	Which of the following describes your ethnic background?
8	Do you speak any other languages fluently? (please select all that apply)
9	(Sexual Orientation) Do you personally think of yourself as:
10	Are you affiliated with the military in any way? (please select all that apply)
Consumer Confidence	
11	How would you rate the present general business conditions in the greater Colorado Springs area?

The screenshot above shows how EI will deliver the crosstabs to Adams County. The tables at the top of the screenshot show what our crosstabs look like. In the top right, you can see that Liberals are more likely to be female. There will be comments in the crosstabs when you hover over the cell as well for more detail.

The links at the bottom show what the first tab of the workbook will look like. This serves as an Index where you can easily navigate to any crosstab (question) in the deck. This makes analyzing the data much easier than scrolling through 50-100 questions.



ADAMS COUNTY



Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

**REQUEST FOR PROPOSAL
CONTRACTOR'S CERTIFICATION
OF COMPLIANCE**

Pursuant to Colorado Revised Statute, § 8-17.5-101, *et. seq.*, as amended 5/13/08, as a prerequisite to entering into a Agreement for services with Adams County, Colorado, the undersigned Contractor hereby certifies that at the time of this certification, Contractor does not knowingly employ or Agreement with an illegal alien who will perform work under the attached Agreement for services and that the Contractor will participate in the E-Verify Program or Department program, as those terms are defined in C.R.S. § 8-17.5-101, *et. seq.* in order to confirm the employment eligibility of all employees who are newly hired for employment to perform work under the attached Agreement for services.

Elevated Insights

Contractor Name

Joey Torretto

Printed or Typed Name

Signature

Lead Analyst and Quantitative Division Head

Title

May 16, 2018

Date

Note: Registration for the E-Verify Program can be completed at: <https://www.vis-dhs.com/employerregistration>. It is recommended that employers review the sample "memorandum of understanding" available at the website prior to registering.



ADAMS COUNTY
43•11•

Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

**REQUEST FOR PROPOSAL
CONTRACTOR'S STATEMENT**

I have read and fully understand all the conditions herein set forth in the foregoing paragraphs, and by my signature set forth hereunder, I hereby agree to comply with all said conditions as stated or implied. In consideration of the above statement, the Bid/Proposal is hereby submitted.

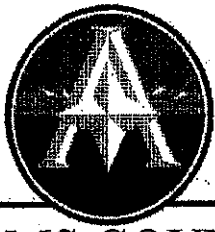
If any of the documents listed on the Cover Sheet are missing from this package, contact Adams County Purchasing. If you require additional information, call the contact person named on the Cover Sheet.

The undersigned hereby affirms that (1) he/she is a duly authorized agent of the Contractor, (2) he/she has read all terms and conditions and technical specifications which were made available in conjunction with this Solicitation and fully understands and accepts them unless specific variations have been expressly listed in his/her Bid/Proposal, (3) the Contractor will accept any awards made to it as a result of the Bid/Proposal submitted herein for a minimum of 120 calendar days following the date of submission.

WE, THE UNDERSIGNED, HEREBY ACKNOWLEDGE RECEIPT OF ADDENDA:

(List addendum numbers separately): ADDENDUM ONE

<u>Elevated Insights</u>		<u>May 16, 2018</u>	
Contractor Name		Date	
<u>[Signature]</u>		<u>Joey Torretto</u>	
Authorized Signature		Printed Name	
<u>Lead Analyst and Quantitative Division Head</u>			
Title			
<u>525 N. Tejon St.</u>			
Address			
<u>Colorado Springs, CO 80903</u>		<u>El Paso</u>	
City, State, Zip Code		County	
<u>(719) - 590 - 9999</u>		<u>N/A</u>	
Telephone		Fax	
<u>joey @ elevatedinsights . com</u>			
Email			



ADAMS COUNTY
COLORADO

Adams County Finance Department
Purchasing Division
4430 South Adams County Parkway
Brighton, Colorado 80601

REQUEST FOR PROPOSAL
REFERENCE FORM

1. Company Name	<u>Transportation Technology Center, Inc. (TTCI)</u>
Address	<u>55500 DOT Rd. Pueblo, CO 81001</u>
Contact Name & Phone	<u>Kari Gonzales / (719)-584-0723</u>
Contact Email Address	<u>kari.gonzales@aar.com</u>
Project Name	<u>Employee Engagement Survey</u>
Project Date & \$Value	<u>\$7,600 (discounts were given) / APRIL-JULY 2017</u>
2. Company Name	<u>USAA Federal Savings Bank</u>
Address	<u>9800 Fredericksburg Road, San Antonio TX 78288</u>
Contact Name & Phone	<u>Ray Zucher / (210)-849-1895</u>
Contact Email Address	<u>raymond.zucher@usaa.com</u>
Project Name	<u>Member Benefits Exploration</u>
Project Date & \$Value	<u>FEB - APRIL 2018 / \$ 57,000</u>
3. Company Name	<u>Frito-Lay Inc.</u>
Address	<u>55500 DOT 5600 Headquarters Dr. Plano, Texas 75024</u>
Contact Name & Phone	<u>Chas Cahn / (972)-334-5826</u>
Contact Email Address	<u>chas.cahn@pepsico.com</u>
Project Name	<u>Cheetos Exploration of Millennial vs. Gen-X Parenting Styles</u>
Project Date & \$Value	<u>MARCH - MAY 2017 / \$ 23,750 (for quantitative phase)</u>