



## REQUEST FOR PROPOSAL: APPLICANT TRACKING SYSTEM

**RFP Release Date: 4/01/2025**

**Bidder Questions Due: 4/11/2025**

**Answers Posted: 4/18/2025**

**Proposal Due: 4/25/2025**

## Summary

Vermont Energy Investment Corporation (VEIC), a mission-driven, nonprofit organization dedicated to reducing the economic and environmental costs of energy use, is seeking proposals from professionals or organizations for an Applicant Tracking System. Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC by **5 p.m. ET on April 25, 2025**. VEIC will not accept responses submitted after 5 p.m. ET. Please submit your response electronically via e-mail to: Chesley Schamroth ([cschamroth@veic.org](mailto:cschamroth@veic.org)) with "RFP Submittal for VEIC Applicant Tracking System" in the subject line.

VEIC will respond to individual questions regarding this RFP only as follows: VEIC will receive questions regarding requirements and scope of work up to 5 p.m. ET April 11, 2025, via e-mail only, to Chesley Schamroth ([cschamroth@veic.org](mailto:cschamroth@veic.org)) with "Applicant Tracking System Question" in the subject line. When appropriate, please refer to the RFP page number and Section Heading for ease of navigation and response. VEIC will post answers on the VEIC website (<https://www.VEIC.org/requests-for-proposals>) no later than April 18, 2025. VEIC will not address questions submitted after 5 p.m. ET April 11, 2025.

# Background

## Vermont Energy Investment Corporation

Vermont Energy Investment Corporation (VEIC) is a mission-driven, nonprofit organization dedicated to reducing the economic and environmental costs of energy use. It carries out its mission, in part, by designing and implementing innovative energy efficiency and renewable energy programs. Founded in 1986, VEIC is nationally and internationally recognized for advancing energy efficiency, energy conservation, and renewable energy programs and projects across the United States, Canada, and Europe. VEIC employs 400 professionals and is headquartered in Winooski, Vermont. It also has a presence in several states, including an office in Washington, DC. For additional information, please see the VEIC Website: [www.VEIC.org](http://www.VEIC.org)

VEIC is a [Just-labeled](#) organization, committing itself to corporate transparency on social justice and equity indicators. We've also adopted the [Social Vulnerability Index](#) across our entire organization to measure the impact our work has on underserved communities. With ongoing employee engagement in [social and energy justice principles](#), justice and fairness are embedded in everything we do. We see opportunities everywhere to create new tools that can help us build the kind of company—and the kind of society—we want to see.

## Schedule and Scope of Work

### RFP and Implementation Schedule

Table 1. VEIC will attempt to adhere to the following schedule but reserves the right to adjust the below schedule as needed.

<b>RFP release</b>	<b>4/01/2025</b>
<b>Respondents Questions Due</b>	<b>4/11/2025</b>
<b>Answers posted</b>	<b>4/18/2025</b>
<b>RFP responses due</b>	<b>4/25/2025</b>
<b>Vendor Finalists Interviews/Demos</b>	<b>5/05/2025 – 5/09/2025</b>
<b>Respondent selected</b>	<b>5/16/2025</b>
<b>Contract negotiations and signature</b>	<b>5/30/2025</b>
<b>Implementation Period</b>	<b>TBD (~6/01/2025 – 10/31/2025)</b>
<b>Contract Term</b>	<b>3 years</b>

## Scope of Work

### Overview:

This Request for Proposal (RFP) seeks proposals from qualified vendors for the implementation of a comprehensive Applicant Tracking System (ATS) for our non-profit organization. The selected solution should enhance the recruitment experience for candidates, hiring managers, and HR staff, ensuring an efficient, user-friendly, and inclusive hiring process.

### Project Objectives:

1. Streamline the end-to-end recruitment process for candidates and VEIC employees participating in the recruitment process.
2. Improve the candidate experience with an intuitive, accessible, and mobile-friendly interface.
3. Provide robust reporting and analytics capabilities to track key hiring metrics.
4. Ensure compliance with applicable federal, state, and local employment laws.
5. Integrate seamlessly with our existing Human Resources Information System (HRIS) and other relevant tools.

### Scope of Work:

The vendor is expected to provide services that include, but are not limited to, the following:

1. ATS Software Features and Functionality:
  - Job requisition process that allows for levels of approval.
  - Candidate management, including customizable workflows for applicant tracking and communication.
  - Job posting management, with the ability to post openings to multiple job boards and social media platforms.
  - Candidate self-service portals for profile creation, application tracking, and updates.
  - Mobile optimization for candidates and hiring managers.
  - Robust search and filtering capabilities for candidate profiles and resumes.
  - Automated notifications and reminders for candidates and hiring teams.
  - Pre-screening and assessment tools.
2. Implementation and Training:

- Development of a detailed project plan, including timelines and milestones.
  - Data migration support from the current ATS or manual systems to the new platform.
  - Configuration of workflows, permissions, and templates to align with organizational needs.
  - Comprehensive training for HR staff, hiring managers, and other stakeholders.
  - Development of training materials and ongoing user support resources.
3. Integration Capabilities:
- Seamless integration with our existing HRIS (ADP) and other key internal platforms.
  - API capabilities to ensure compatibility with third-party tools.
  - Single sign-on (SSO) support for enhanced security and ease of use.
4. Reporting and Analytics:
- Dashboards and customizable reports to monitor metrics such as time-to-fill, source effectiveness, and candidate demographics.
  - Tools to support Equal Employment Opportunity (EEO) and diversity reporting.
  - Real-time analytics to support strategic decision-making.
5. Support and Maintenance:
- Dedicated account management and customer support team for full duration of contract.
  - Ongoing technical support and system updates.
  - Availability of user resources such as online knowledge bases and forums.
  - Defined Service Level Agreements (SLAs) for issue resolution and system uptime.
6. Data Security and Compliance:
- Compliance with applicable data privacy laws (Respondent should include in their response their familiarity and compliance with any applicable data laws).
  - Compliance with VEIC's Vendor Information Security Requirements (Appendix A)
  - Secure storage and transmission of sensitive candidate information.
  - Detailed audit logs and user access controls.

### Deliverables:

- Fully implemented and operational ATS meeting the requirements.
- Training sessions and user guides for HR staff.
- Documentation of integration workflows and configurations.
- Initial set of reports and dashboards tailored to our organization's needs.

### Timeline:

The implementation project is expected to be completed by 10/31/25. Vendors should provide a proposed timeline with key milestones and deliverables.

### Evaluation Criteria: Proposals will be evaluated based on the following:

- Functionality and features of the proposed ATS.
- Vendor experience and expertise in implementing similar systems, and ability to meet all requirements outlined in this RFP.
- Ability to meet the project timeline.
- Total cost, including implementation, training, and ongoing support.
- Customer references and feedback from similar clients.

### Proposal Submission Instructions:

Respondents are required to submit a detailed proposal including:

- Company background and experience.
- Overview of the proposed ATS solution and how it meets the scope of work.
- Implementation approach and timeline.
- Price quotation with full cost breakdown, including initial implementation and all recurring fees.

Respondent's standard agreement template for delivering these services

- References from similar projects.

We look forward to reviewing your proposals and selecting a partner to support our mission of delivering clean energy solutions with a focus on equity and access for vulnerable communities.

# Preparing and Delivering a Proposal

For ease and efficiency of review, VEIC has specified the requirements for submitting a proposal to this RFP. Respondents must follow and be responsive to ALL requirements of this RFP. Proposals should be clear and concise, presented in the form of a written response with sections and sub-headings. Proposals that are not in the required format or are incomplete may be disqualified at VEIC's sole discretion.

Respondents will be scored on the individual criteria summarized in Table 2.

**Table 2: Response Summary, Evaluation Criteria and Points**

Scoring Category/Criteria	Description	Weighting
Functionality	Meets all state and federal employment laws, as well as Cyber Security considerations and protection of data	25%
User Experience	Compatibility with VEIC systems and platforms	20%
Technology Requirements	UX of HR, Hiring Managers, Applicants, and overall ease of use and functionality	10%
Support & Implementation	Template and customizable solutions	20%
Pricing	Able to meet VEIC pricing requirements	25%
<b>Total</b>		<b>100%</b>

## Response Requirements

Please respond using the template provided in Exhibit B or ensure that the information in Exhibit B is addressed in your written response.

- A. Company Info:** Name of the business, contact person, and contact information including full legal name, address, telephone, mobile telephone number, e-mail address, and website address, as applicable.
- B. Company profile:** a brief company profile, including any subcontractors.
- C. Statement of ownership:** the type of business entity (sole proprietorship, corporation, LLC, or other).

- D. Narrative and Bid Summary Table:** a narrative outlining the respondent's approach to the Scope of Work and include proposed values or summary information for each of the scoring criteria listed in Table 2 above.
- E. Budget:** Each proposal must include a budget. The budget for the Scope of Work shall not exceed thirty-five thousand dollars (\$35,000) per year, up to a maximum of ninety-five thousand dollars (\$95,000) for three years. Respondent must include in their proposal a description of any assumptions made regarding the Scope of Work that may have an impact on the budget.
- F. Qualifications and Team Experience:** This section of the response must demonstrate the Respondent's team's knowledge, experience and ability to successfully complete the Scope of Work.

Provide details on the roles and responsibilities of key personnel and team members.

**Proposal Exceptions Summary Form:** A Proposal Exception Summary Form (see below) with exceptions to items in any section of this RFP. Failure to note exceptions on the Proposal Exception Summary Form will be deemed to be acceptance of the terms of this RFP and Exhibit A. VEIC will take these exemptions into consideration when evaluating responses. If exceptions are not noted in Respondent's proposal but raised during contract negotiations, VEIC reserves the right to cancel the negotiations and award projects to other Respondents. A copy of the respondent's vendor agreement template should be attached as an appendix to the proposal.

### Exceptions Form

RFP/ Contract Reference	Bidder's Proposal Reference	Brief Explanation of Exception
(Reference specific point to which exception is taken)	(Page, section, items in bidder's proposal where exception is explained)	(Short description of requested exception)
1.		

2.		
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- **Insurance:** Respondent must supply with the proposal a current Certificate of Insurance showing evidence of General Liability coverage. If awarded a Contract, Respondent will also be required to provide a final certificate of insurance to show compliance with the minimum insurance requirements set forth below, and where applicable, Certificate(s) of Insurance shall name VEIC as an Additionally Insured party. It is the responsibility of the successful bidder to maintain current Certificates of Insurance on file with VEIC throughout the term of the agreement. Respondent must raise any questions about the insurance requirements by the deadline set forth above and must identify any exceptions to the anticipated minimum requirements in its response.

Insurance Policies	Limits
Commercial General Liability	\$1m per occurrence/\$2m aggregate
Employer's Liability	\$500k per accident; \$500k per disease; \$500k policy disease limit
Technology Errors & Omissions	\$1m per occurrence/\$2m aggregate
Cyber Liability Insurance	\$1m per occurrence/\$2m aggregate

- **Information Security Requirements:** Please review the Information Security Requirements listed in **Appendix A** and provide a complete Information Security Questionnaire (available at this [LINK](#)) with your response. VEIC will not consider any exceptions or requests to negotiate terms that were not called out as exceptions to the Information Security Requirements in the RFP response.

## Limitation

This RFP does not commit VEIC to award a contract or to pay any costs incurred in the preparation or submission of proposals. VEIC reserves the right to reject any or all proposals received in response to this RFP, to negotiate with any qualified Respondent, or to cancel in part or in its entirety the RFP if any of these actions are deemed by VEIC in its sole discretion to be in VEIC's best interest.



## **APPENDIX A: VEIC Vendor Information Security Requirements**

Vermont Energy Investment Corporation and its individual operating companies, divisions, subsidiaries and affiliates (collectively, "VEIC") must ensure that access to its information systems, networks, facilities and other resources (collectively, "VEIC Systems") and its data is appropriately controlled and that these resources are adequately protected. This includes access by vendors, other third parties, and their respective employees, agents, subcontractors, and representatives (collectively, "Vendors" and each individually, a "Vendor").

This Vendor Information Security Requirements document (this "VISR") sets forth the obligations that apply to Vendors that receive access to (i) VEIC Systems, (ii) VEIC Data (as defined below) and/or (iii) VEIC premises in connection with receipt of access to VEIC Systems and/or VEIC Data, when engaged in business with any VEIC entity (such entity, "Company"). This VISR supplements the terms and conditions set out in any agreement between Company and Vendor to which this VISR is attached or that otherwise incorporates this VISR by reference (the "Agreement"). VEIC Systems and VEIC Data are confidential information of VEIC. For purposes of this VISR, "VEIC Data" means personally identifiable information / personal information of VEIC's customers or associates, protected health information, payment card information, and any other confidential or restricted information or data of VEIC that if disclosed to the public or unauthorized parties (including competitors) is likely to cause significant harm or competitive disadvantage to VEIC (e.g., trade secrets, marketing plans, financial information, budgets, IP (internet protocol) addresses and IP ranges, strategic plans, employee compensation and performance information).

### **1. General Obligations**

If Vendor is provided with access to VEIC Data or VEIC Systems as part of its engagement with Company, Vendor shall for the entire duration of the engagement:

a) maintain at all times a comprehensive and formally documented information security program that:

1. is based on a reputable information security standard;
2. complies with applicable laws and regulations and;
3. includes appropriate administrative, technical, physical, organizational and operational safeguards and other security measures designed to:
4. establish minimum required standards related to the safeguarding of Vendor data and VEIC Data contained in both paper and electronic records;

5. protect the security and confidentiality of Vendor data and VEIC Data in a manner consistent with applicable industry standards;
6. protect against any anticipated threats or hazards to the security or integrity of Vendor data and VEIC Data; and
7. protect against unauthorized processing, loss, use, disclosure or acquisition of or access to any Vendor data or VEIC Data; and upon Company's request, provide a summary or overview of this security program and/or a written confirmation that an assessment of Vendor's information security program has been conducted by an independent assessor and that any discovered program deficiencies have been remediated;

b) cooperate with security audits/assessments/testing as may be periodically requested by Company (and no more than annually unless a problem is identified) upon prior written notice to Vendor, to be performed by or on behalf of Company to confirm Vendor's compliance with this VISR; provided that such audits/assessments shall be conducted at a time(s) mutually agreed by the parties, during Vendor's normal business operations, in a manner minimally disruptive to Vendor's business, and subject to reasonable confidentiality requirements consistent with the confidentiality provisions in the Agreement);

c) ensure that Vendor personnel or representatives that receive access to VEIC Data are competent, properly trained in information security matters and understand Vendor's obligations under this VISR;

d) ensure that Vendor personnel are assigned unique authentication credentials, such as user names, passwords, digital certificates, tokens and smartcards, for access to VEIC Data, and that these credentials are handled with the utmost care and confidentiality to prevent unauthorized disclosure or misuse;

e) ensure that, unless expressly authorized in writing by Company, no VEIC Data shall be permanently stored on laptops that are not equipped with full hard drive encryption, and that no VEIC Data is stored on or accessed by USB drives, mobile devices, or any other portable storage media belonging to Vendor or Vendor personnel;

f) grant access to VEIC Data only on a need to know basis, and not distribute such VEIC Data outside the purpose of the engagement;

g) have effective and up-to-date endpoint protection in place, which includes capabilities for dynamic exploit protection, dynamic malware protection, mitigation, remediation and forensics, on all Vendor systems that are used to access VEIC Data;

h) upon termination of the engagement, upon request of Company, or at any such other time as may be required by applicable law, securely return, securely destroy or render unreadable or undecipherable all VEIC Data provided to Vendor that remains in Vendor's possession or control, and provide Company with a written certification that such return or alternate action has occurred;

- i) notify Company of any unauthorized use of, disclosure of, or access to VEIC Systems or VEIC Data, or any failure to comply with this VISR, promptly and in no event more than twenty-four (24) hours after Vendor confirms such prohibited activity and shall cooperate with Company in taking necessary or advisable corrective actions.
- j) handle all Confidential Information in accordance with all applicable laws and contractual obligations. In the event that the Vendor, pursuant to applicable law or regulation or legal process, is requested or required to disclose VEIC Data, the Vendor shall provide the Company with prompt notice of such requirement in order to enable the Vendor to confer with the Company concerning the steps that may be taken to reduce the extent of VEIC Data that must be disclosed and/or to enable the Company to seek an appropriate protective order or other remedy reducing the extent of VEIC Data that must be disclosed. In any event, the Vendor shall disclose only such VEIC Data that the Vendor is advised by legal counsel is legally required to be disclosed in order to comply with such applicable law or regulation or legal process (as such may be affected by any protective order or other remedy obtained by the Company) and shall use reasonable efforts to ensure that all VEIC Data is so disclosed will be accorded confidential treatment.

## **2. Access to VEIC Systems**

Compliance with this section of the VISR is required for the entire duration of the engagement if Vendor is provided access to VEIC Systems. In these situations, Vendor shall:

- a) ensure that requests to grant Vendor access to VEIC Systems follow approved, formal processes and adhere to the “least privileged access principle” (i.e., access to information resources must be limited to only those individuals whose job requires such access, and access to information resources must be prevented unless explicitly allowed);
- b) ensure that all remote access to VEIC Data by Vendor personnel or representatives is secured using multi factor authentication via a secure method or another authentication mechanism as agreed upon with VEIC;
- c) ensure that Vendor personnel shall not attempt to gain access to any VEIC Systems that are not specifically related to fulfilling the purpose of the engagement;
- d) ensure that system access provided to Vendor personnel is promptly terminated (i) upon termination of the engagement with Vendor, (ii) when Vendor personnel change functions and no longer require access, (iii) when Vendor personnel are no longer assigned to Company’s account or, (iv) when for any reason, access is no longer required;
- and e) accept and agree that, if and while Vendor personnel are using any VEIC Systems, system activity (e.g. system events, unauthorized log-in attempts or unauthorized transmissions of confidential information) may be subject to monitoring, to protect Company information assets, to the extent allowed by law and pursuant to all reasonable security instructions and VEIC policies or guidelines.

## **3. Access to VEIC Premises**

Compliance with this section of the VISR is required for the entire duration of the engagement if Vendor is provided physical access to any non-public areas in Company's location or premises and receive access to VEIC Systems or VEIC Data. In these situations, Vendor shall and shall ensure that Vendor personnel will:

- a) comply with guidance and policies provided by the Company, verbally or in writing, with regard to building safety and security, while working on site at Company's premises;
- b) not attempt to gain access to any Company facilities or areas within those facilities that are not specifically related to fulfilling the purpose of the engagement;
- c) treat security and identification devices (such as access badges) provided to them by Company with the utmost care and confidentiality to prevent unauthorized access;
- d) ensure that Vendor personnel shall have available a valid photo ID at all times while on Company premises and shall present such identification upon request of Company personnel; and
- e) refrain from interfering with VEIC's network and infrastructure or causing any damage or threat to such network and infrastructure.

#### **4. Housing Services, Hosting Services and Cloud Services**

Compliance with this section of the VISR is required for the entire duration of the engagement if Vendor provides facilities that host Company infrastructure (e.g., data centers), provides facilities and infrastructure for Company to manage and store its data, provides facilities and infrastructure to host supplier-provided IT solutions, or provides professional services that support the deployment and ongoing management of externally-hosted (not within Company facilities) information resources. If Vendor is providing any of these services to Company, Vendor shall:

- a) comply with the SOC2 control framework and regulations, or a similar control framework with at least an equal security standard;
- b) periodically provide Company (at least annually) with an unqualified SOC 2 (Type II) examination in accordance with the AICPA AT Section 101, or any successor or equivalent standards, by qualified, independent auditors engaged and compensated by Vendor, covering Vendor's controls and systems relating specifically to all aspects of the services provided ("SOC 2 Report"); and
- c) provide security operational integration such as logs, monitoring and remediation, for integration with VEIC's SOC requirements.
- d) ensure that all confidential data is encrypted in transit and at rest.

#### **5. Developing or Maintaining Software**

Compliance with this section of the VISR is required for the entire duration of the engagement if Vendor develops and/or maintains software for Company as part of the engagement. In these situations, Vendor shall:

- a) maintain a secure Systems Development Life Cycle (or "SDLC") process, including at a minimum:

1. evidence of a secure code review process;
2. periodic application penetration test executed by a specialized third party;
3. a procedure that results in timely resolution of all discovered high and medium risk vulnerabilities (using the Common Vulnerability Scoring System (or "CVSS"); and
4. a security checkpoint in change management.
5. if a web/internet-based application – ensure staff is trained on, and adhere to secure coding principles described in OWASP Secure Coding Guidelines that covers, but not limited to:
  - i. input validation
  - ii. output encoding
  - iii. authentication and password management
  - iv. session management
  - v. access control
  - vi. cryptographic practices
  - vii. error handling and logging
  - viii. data protection
  - ix. communication security
  - x. file management
  - xi. memory management
  - xii. general coding practices

b) apply the following measures in accordance with industry best practices:

1. patch management;
2. vulnerability assessment;
3. strong access control;
4. logging; and
5. system hardening.

c) provide to Company, upon request (in the event of an incident or no more than annually), evidence that periodic application penetration tests are performed and discovered vulnerabilities are remediated; and

d) periodically (no more than annually) provide Company with an ISO, SOC2 Type II or Type III, or similar certification reflecting the compliance of Vendor with the above obligations.

## **6. Maintaining Hardware**

Compliance with this section of the VISR is required for the entire duration of the engagement if Vendor maintains hardware for Company as part of the engagement. In these situations, Vendor shall apply the following measures with respect to the hardware and peripherals it provides and/or maintains:

- a) hardware hardening according to industry best-practices or VEIC instructions; and

industry standard-based security or prevention measures (anti-tampering, air gapping etc.).

## **7. Privileged Access**

Compliance with this section of the VISR is required for the entire duration of the engagement if Vendor (i) manages IT systems (hardware or software) for VEIC or (ii) is responsible for any aspect of Identity and Access Management (IAM) related to VEIC systems, including Privileged Access controls. For purposes of clarity, this Section 7 will apply only if Vendor is providing services pursuant to Sections 4, 5 or 6 above. "Privileged Access" is defined as access that provides a capability to alter the properties, behavior, or control of an information resource, change system control parameters, alter other users' access to data, or bypass or change system and security controls. In these situations, Vendor shall:

- a) Maintain and disseminate to Vendor employees a written access control policy based on reputable industry standards and the least privileged access principle.
- b) Include formal instructions for the following in Vendor's IAM procedures:
  - 1. Approval for, creation of and providing entitlements for privileged accounts;
  - 2. Removal of Privileged Access upon termination of the engagement with Vendor, when Vendor personnel change functions and no longer require access, when Vendor personnel are no longer assigned to the VEIC account or, for any reason, Privileged Access is no longer required.
- c) Maintain a recertification cycle (validation of permissions granted) for privileged accounts that includes:
  - 1. Maintaining a list of Vendor personnel with Privileged Access to VEIC Systems or other IT resources that support VEIC Systems or operations;
  - 2. Reviewing Vendor personnel's access rights at regular intervals (at least quarterly) and after any changes, such as promotion, demotion, or termination of employment;
  - 3. Taking immediate action to correct any discrepancies discovered during this review; and
  - 4. Upon request by Company, providing reporting related to this review.
- d) Monitor and adequately log creation of and changes to privileged accounts for systems used by, accessed by, or in-place to support Company and, upon discovery of anomalies, notify Company.
- e) Monitor and adequately log all actions performed by Vendor personnel with Privileged Access to systems used by, accessed by or in-place to support Company, report any anomalies to Company and, upon request, provide a history of all system management actions performed by Vendor personnel that could impact the confidentiality, integrity or availability of services or systems.
- f) Implement procedures for emergency access (e.g., a "break glass" account) and ensure that passwords are properly secured and changed after each use.

- g) Ensure that all Vendor personnel (including technical and functional support personnel, operators, network administrators, system programmers, and database administrators) have an individually assigned unique identifier (user ID) that can be traced to the accountable individual.
- h) Implement controls to ensure secure log-on procedures, quality passwords, a secure authentication method, and session time-outs for inactive sessions at the network, operating system and database level.
- i) Ensure that non-personal accounts (e.g., Admin or Root, service accounts, batch accounts, and back-up accounts) cannot be used by an individual for system access.
- j) Where technically feasible, integrate solutions provided by Vendor with the VEIC privileged access management (PAM) solution.

## APPENDIX B: VEIC Applicant Tracking System Criteria

### I.FUNCTIONALITY (*Weighted at 25%*)

#### Attract: Job Advertising

- Describe the solution's job advertising capabilities and how it enables recruiters to track the effectiveness of sources and manage spend while maximizing the reach and visibility of job postings.
- Can the solution track candidate sources and provide analytics on the effectiveness of various source channels?
- Can the solution auto-post jobs to job boards, job distribution partners, social networks, or programmatic advertising partners from within the platform?
- Please list all job board, social network, or programmatic advertising integration partners.

#### Attract: Sourcing

- Describe how the solution provides advanced sourcing capabilities to effectively identify and attract qualified candidates from diverse sourcing channels.
- Does the solution provide advanced candidate search capabilities based on standard and flex fields and/or keyword, boolean search using a candidate's full profile content?
- Can the solution auto-run candidate search agents to build a pipeline of candidates matching specific search criteria?
- Can the solution use AI to source and recommend passive candidates who have not previously applied based on job requirements using publicly available information?
- Can the solution use AI to rediscover candidates based on job requirements within existing databases?
- Can the solution automatically tag skills/attributes based on inferences from candidate profiles?

#### Attract: Referral Management

- Describe how employees submit referrals to the organization or to specific positions.
- Describe how referrals are marked in candidate list view for visibility.
- Describe how referral progress and incentives are tracked in the solution.
- Does the solution have customizable referral rules (such as expiration dates) allowing for both job-based and general referral submissions?
- Can the solution generate a unique referral link to share a specific job on social networks, email, or as part of a referral campaign?



- Can employees view referral status (perhaps customizable to show only specific stages of selection process)?

### **Engage: Candidate Relationship Management**

- Describe how the solution tracks, organizes and updates interactions with the status of candidates.
- Can the solution track, organize and manage all candidate contact information and communication history, with notes relating to interactions with prospects and candidates?
- Can the solution segment and categorize distinct talent pools based on location, skills, job function, education, experience, etc. in a searchable database?
- Can the solution create and deliver automated branded campaigns and communications to engage passive applicants via multiple channels (email, text messaging) to candidates in the pipeline?
- Can the solution discover talent matches among existing employees and across company departments and organizations?
- Can the solution create custom correspondence throughout the recruitment life cycle (e.g., automatic or manual email or SMS candidate correspondence)?
- Does the solution have analytics and reporting capability on the effectiveness of campaigns and candidate engagement, including response rates, conversion rates, and click-through rates?

### **Engage: Candidate Matching**

- Describe how the solution uses AI to rank or score comprehensive candidate profiles against job requirements and prioritizes qualified candidates.
- Describe the transparency and explainability implemented within the recommendation models, and the degree of control that organizations have on such recommendation models.
- Can the solution match or recommend both internal and external candidates to open jobs?
- Can the solution surface silver medalist candidates to similar open positions?
- Can the solution recommend roles to candidates?

### **Engage: Career Sites**

- Describe capabilities available for organizations to configure and customize engaging career sites that reflect the employer brand.
- List career site language support.
- Can the solution create multiple branded sites/landing pages for separate candidate segments (ie internal, external, early career hires)?
- Does the solution have career site content management tools to create branded content?
- Can the solution cascade changes across multiple sites without vendor involvement?
- Can the solution create personalized candidate experiences by making job recommendations or content recommendations based on user's previous interactions?
- Does the solution provide virtual assistants for a conversational job search or for checking on the status of an application?

- Does the solution provide analytics and reporting on career site performance such as candidate engagement, application, drop out and conversion rates to measure effectiveness?
- Can candidates search and review open positions on the career site by function, location, keyword, etc.?
- Can the solution create job alerts?
- Do visitors have the ability to join the employers' talent community if they have interest in the organization but they do not find the right open role or are not yet ready to apply for a position via employer's career site?

### **Engage: Agency Hiring**

- Describe how external agencies view requisitions and submit candidates.
- Are agency candidates clearly marked in the candidate list view?
- Can the solution validate candidate ownership to track and flag duplicate candidates?
- Does the solution have role-based access control for external recruitment agencies?
- Can users manage, add, and remove agency lists in the platform?
- Can the solution manage hiring partners/agencies to control their ability to add or update documents and data?

### **Select: Applicant Tracking**

- Describe how the tool's applicant tracking capability streamlines recruitment processes and improves efficiency in managing candidate profiles, applications, and hiring stages.
- Does the solution have automated workflows triggers to push a communication or task out to candidate, recruiter, hiring manager when a particular step in selection process is reached?
- Can the solution automatically track and merge duplicate candidates? Describe what qualifiers are used to identify a duplicate candidate.
- Does the solution have automated workflows and triggers to push communications or tasks out to candidates, recruiters or hiring managers?
- Can the solution take bulk actions on candidates, including messaging, dispositioning, and extending offers?
- Does the solution have automated dispositioning of candidates depending on their status in candidate selection workflow?
- Can the solution create automated rejection emails corresponding to the specific reasons' for candidates' dismissal?
- Can the solution configure and manage multiple email templates and workflows based on candidate type (internal vs external)?
- Do candidates have the ability to request deletion of their data under compliance (GDPR) rules?

### **Select: Interview Scheduling and Management**

- How does the talent acquisition tool facilitate interview scheduling across time zones, including features such as automated scheduling, calendar integration, and availability tracking?

- Describe calendar integrations.
- Does the solution provide automated candidate and interviewer scheduling and rescheduling?
- Does the solution provide automated reminders and notifications to both candidates and interviewers, ensuring timely attendance and reducing no-show rates?
- Does the solution offer the ability to schedule sequential/parallel /individual/panel interviews?
- How does the solution enable consistent structured interviewing workflows and team-based hiring?
- Can the solution create multiple structured interview process flows with set questions to ask during interviews?
- Can the solution create structured scorecards to evaluate candidates that may also be saved and reused later?
- Can the solution rank and compare candidates side-by-side across multiple stakeholders using shared candidate scorecards?
- Does the solution enable hiring teams and recruiters to collaborate to capture evaluation comments/feedback?

### **Hire: Requisition Management**

- Describe how the solution transparently manages the end-to-end requisition approval process and facilitates collaboration and communication among hiring managers, recruiters, and other stakeholders.
- Can the solution manage and configure tables in requisition form to mirror core HR system tables for seamless integration and new hire processing?
- Does the solution provide dynamic approval routing through a defined approval process (multiple levels of approval, intelligent routing) with automatic notifications that allow approval without logging into the solution (e.g., email approval)?
- Can the solution configure dynamic approval workflows?
- Does the solution have customizable requisition templates with critical job details, prescreen questions and job descriptions?
- Can the solution create evergreen requisitions?

### **Hire: Offer Management**

- How does the talent acquisition tool facilitate the creation and customization of offer letters, ensuring accuracy, compliance, and consistency in the offer management process?
- Can the solution create and distribute electronic offer letters and manage a template library?
- Can the solution modify offer templates before extending them to candidates?
- Can the solution rescind/redraft/re-extend offers?
- Can the solution capture candidate responses? Please list integration with document management and signature tools.

- Does the solution have a centralized dashboard to track the status of offers and view details?
- Does the solution provide automated approval processes across stakeholders, enabling collaboration and transparency based on various rule sets?
- Can the solution model competitive and equitable offers using salary data from internal or external markets?
- Can the solution provide automated bulk offers for high-volume recruiting?

## Hire: Onboarding

- How does the solution facilitate a seamless onboarding process for new hires, ensuring a smooth transition from candidate to employee?
- Can the solution create and maintain multiple onboarding workflows based on various rule sets of the new hire (e.g., location, level, job family)?
- Can the solution create and manage a template library of onboarding documents with automatic rule-based distribution to streamline administrative tasks? The vendor provides a library of templates, and organizations can create their own custom forms using a forms builder engine.
- Does the vendor have the ability to maintain the up-to-date legal versions of the compliance forms needed for every jurisdiction?
- Can the solution integrate with governing authorities for compliance forms (e.g., I-9 in the U.S.)?
- Can the solution manage integration with the governing authority from end to end?
- Does the solution have a central onboarding portal for new hires and hiring managers to review, sign, and complete tasks and documents?
- Can the solution capture candidate signatures? Please list integration with document management and signature tools.
- Can the solution host and maintain content and video within the onboarding portal?
- Can the solution convert online forms into PDF documents for employee recordkeeping?
- Does the solution support additional use cases for other worker transitions such as internal job transfers (crossboarding/transboarding), or offboarding?
- Does the solution provide the ability to set up automated push notifications/reminders to candidates/hiring managers/recruiters for tasks to be completed?
- Does the solution have the ability to bulk update candidates' task statuses?
- Does the solution have the ability to support rehire scenarios?
- Does the solution have the ability to integrate with downstream systems such as service platforms (e.g. Service Now) or access management tools to automate access and provisioning tasks and journeys?
- Does the solution provide ID reconciliation from pre-hire (candidate personal email) to employment (assigned employee ID)?
- Is the solution accessible for hiring managers, administrators and candidates via mobile and desktop devices?
- Does the solution offer analytics and reporting capabilities?

## **Hire: Internal Mobility**

- Describe how the solution supports internal mobility.
- Does the solution maintain separate career sites for internal candidates with automatic notifications of new openings?
- Does the solution support a full range of different opportunity types (coach, projects, shadow, etc.) with pre-packaged templates to edit?
- Does the solution provide advanced search capabilities for employees?
- Can the solution clearly identify internal candidates within applicant tracking?
- Can the solution automatically surface and recommend internal candidates for open requisitions? If yes, describe any explainability feature for the recommendations.

## **II.USER EXPERIENCE (Weighted at 20%)**

### **Candidate Experience**

- How does the solution prioritize and enhance end-to-end candidate experience throughout the recruitment process?
- Does the solution provide candidate self-service for profile management, application status, automated job search agents, job cart to save jobs of interest, talent pool engagement and other functions?
- Does the solution provide one-click apply functionality, so that candidates can apply with existing social profiles?
- Does the solution provide a personalized experience on the career site with job recommendations based on content viewed?
- Does the solution offer a virtual assistant for conversational job searches or to check on application statuses?
- Can candidates communicate via SMS, text messaging, social networks, email, etc.?
- Is the candidate experience device-agnostic and can it be viewed from a desktop, mobile or tablet?

### **Hiring Manager Experience**

- Describe how the solution supports hiring managers by providing intuitive workflows for managing requisitions, reviewing candidates, and providing feedback.
- Does the solution provide real-time access to candidate data, interview schedules and feedback, allowing for efficient decision-making and streamlined communication accessible via mobile or desktop?
- Does the solution include hiring manager dashboards with reporting capabilities to view candidates at a glance, including disposition status and hiring metrics?

## Recruiter Experience

- How does the talent acquisition tool enhance the recruiter experience by providing robust sourcing capabilities, such as AI-powered candidate matching, resume parsing, and access to diverse talent pools?
- How does the tool support collaboration and communication among recruiters, allowing them to share candidate profiles, provide feedback, and collaborate on hiring decisions in real-time?

## Admin Experience

- How does the solution simplify and streamline administrative tasks, such as managing user permissions, generating reports, and maintaining compliance with data privacy regulations?
- Does the solution provide a centralized dashboard to manage and monitor all candidates, requisitions, and efficacy of recruiting efforts?
- Can the solution manage custom security groups and role-based restricted access?
- Can the solution archive and purge resume and requisition history?

## III. TECHNOLOGY: *(Weighted at 10%)*

### INTEGRATIONS

- Does the solution have a bidirectional integration with ADP to ensure a smooth flow of data between both systems? Is it purely a data integration or an experience integration?
- Please list integrations with job board, recruitment marketing and social media platforms.
- Please list integrations with background check vendors.
- Please list integrations to all other talent acquisition tools.
- Describe custom integration capabilities to drive integrations with other downstream platforms.
- Describe error monitoring and handling for out of the box integrations.
- Clarify limits on the volume of data that can be inserted/deleted/updated on daily/weekly/monthly/annual basis.
- List mass export/import tools available.
- Describe data purge processes available within the platform (especially from GDPR/Compliance standpoint).

### AI and Ethics

- Describe any embedded AI functionality that improves user experience, drives automation and supports intelligent candidate screening and selection processes.
- Describe virtual assistant capabilities.
- How does the solution ensure responsible AI practices, such as "human-in-the-loop" input, fairness, transparency, degree of control, and bias mitigation.

- Describe the mechanisms in place to regularly monitor and address potential biases or unintended consequences that may arise from the use of AI.

## **Analytics, Reporting and Compliance**

- Describe the solution's comprehensive analytics, reporting and presentation capabilities related to recruitment and onboarding.
- Describe reporting capabilities related to compliance, including OFCCP, EEO, and Affirmative Action in the US.
- Please advise on pricing and process for additional custom-built reports.
- Describe how the solution supports global data privacy requirements, such as candidate attestations at time of application.

## **IV.SUPPORT AND IMPLEMENTATION: (Weighted at 20%)**

### **Customer Support**

- Describe customer support including availability and location of support.
- Provide an overview of ongoing customer support through the contract term. Is a dedicated representative provided to clients?

### **Implementation**

- Describe the implementation process and timelines for this solution.
- Describe the implementation team, role, and responsibilities.

### **Ongoing Education/Training**

- Describe included trainings such as train the trainer, self-service, etc.
- Describe how the solution provides ongoing support (e.g. new feature release education, etc.).

## **V.PRICING: (Weighted at 25%)**

### **Pricing**

- What is the initial setup or install fee?
- Are there any other one-time additional fees (Example: Training)?
- Describe the pricing structure and criteria for pricing (ie per # of EEs or per # of users)
- Please describe any API fees (connections, calls, etc.)
- Please list any other reoccurring fees that are not listed in the pricing models above.