

# AWARD RECOMMENDATION

## Notice of Intent to Award Number: 24000000113

The Department of Technology, Management, & Budget’s Procurement office has completed the evaluation of Request for Proposal No. 230000002173 - Employee Engagement Survey for State of Michigan Employees and has recommended an award to Custom Insight in the amount of \$220,000.00, pending State Administrative Board approval, if applicable. More information on the State Administrative Board can be found at: [State Administrative Board](#).

Bidders who were not recommended for the award are encouraged to schedule a debriefing session with the Solicitation Manager. The debriefing session will provide the bidder with the State’s rationale on why the bidder was not recommended for the award. The Solicitation Manager may be contacted as follows:

Jordana Sager, Solicitation Manager.  
 SagerJ2@michigan.gov  
 517-896-1903

### Background Information:

This Request for Proposal (RFP) was to solicit responses for selection of a Contractor to provide Employee Engagement Survey for State of Michigan Employees for DTMB. The term of this contract is four-years with up to two additional two-year renewal options.

### Bidders:

The RFP was posted on SIGMA VSS on Monday, July 10, 2023, for 28 days. The following bidders submitted proposals by the published due date of August 7, 2023.

Bidder	Address, City, State, Zip Code	SDVOB*	GDBE**
Baton Global LLC	317 6th Ave, #1100, Des Moines, IA, 50309	No	No
Carahsoft Technology Group Corp	11493 Sunset Hills Road Suite 100, Reston, VA, 20190	No	No
Custom Insight LLC	204 East 2nd Ave # 127, San Mateo, CA, 94401-3904	No	No
Hollingsworth Consulting LLC	715 Fairview Rd, Zanesville, OH, 43701	No	No
Spencer Stuart Star US Inc. /Kincentric	1331 Tyler St. NE, Suite 200, Minneapolis, MN, 55413	No	No
Korn Ferry	233 S Wacker Dr., Suite 700, Chicago, IL, 60606	No	No

\*SDVOB: Service-Disabled Veteran Owned Business

\*\*GDBE: Geographically Disadvantaged Business Enterprise

# EVALUATION SYNOPSIS

## I. Evaluation Process

A Responsible Vendor is a vendor that demonstrates it has the ability to successfully perform the duties identified by the solicitation. A Responsive proposal is one that is submitted in accordance with the solicitation instructions and meets all mandatory requirements identified in the solicitation.

### Proposal Instructions: Evaluation Process

	Technical Evaluation Criteria	Weight
1.	Schedule A, Statement of Work, Sections 1 - 2	50
2.	Schedule A, Statement of Work, Sections 3 - 5	15
3.	Schedule A, Statement of Work, Section 6 - 9	10
4.	Vendor Questions Worksheet	5
5.	Vendor Questions Worksheet - Experience	20
	<b>Total</b>	100

Proposals receiving 80 or more technical evaluation points will have pricing evaluated and considered for award.

The full evaluation process is stated in the RFP Proposal Instructions.

## II. Evaluation Method

Responses to this solicitation were reviewed by a Joint Evaluation Committee, which consisted of the following individuals:

Voting	Voting
Ashley Kuykendoll State Assistant Administrator Treasury	Kelly Manning Director, Office of Performance Management DTMB
Colin Murad Engagement Specialist DTMB	Bethany Rigg Employee Engagement Strategy Manager DTMB
Shelly Murrell Workforce Transformation Manager DHHS	Jordana Sager Category Analyst DTMB

## III. Evaluation Results

### A. Baton Global LLC

The Evaluation Team determined that Baton Global based on a score of 62.5, did not meet the requirements of this RFP. This determination was accomplished by evaluating their responses to the Technical Evaluation Criteria.

- Schedule A, Statement of Work, Sections 1 – 2 24.5/50

The Evaluation Team determined that overall, the responses were mostly unsatisfactory, and the following deficiencies were noted:

- a. 1.1.A. Survey Questionnaire Design - The Bidder did not meet the State's requirements related to questionnaire design.
  - b. 1.1.B. Employee Respondent Demographic Data – The Bidder did not meet the State's requirements related to employee demographic data.
  - c. 1.1.E. Communication Plan and Templates - The Bidder did not meet the State's requirements related to the communication plan and templates.
  - d. 1.1.F. Segmentation/Survey Coverage - The Bidder did not meet the State's requirement of benchmarking and the capturing of historical data.
  - e. 1.1.G. Respondent Email List - The Bidder did not meet the State's requirement related to respondent email list.
  - f. 1.1.H. Survey IT Checklist and Testing - The Bidder did not meet the State's requirement related to survey IT checklist and testing.
  - g. 1.1.I. Survey ADA Compliance, Usability and Testing - The Bidder's exception to ADA did not meet the State's requirement.
  - h. 1.1.3.B. Preformatted Reports - The Bidder did not meet the State's requirement related to preformatted reports.
  - i. 1.1.3.C. Custom Reports - The Bidder did not meet the State's requirement related to custom reports.
  - j. 1.1.3.E. Comment Reports - The Bidder did not meet the State's requirement related to comment reports.
  - k. 1.1.3.F. Analysis - The Bidder did not respond to the question asked and did not check either of the bidder boxes.
  - l. 1.1.3.H. Technical Support - The Bidder did not meet the State's requirement related to technical support.
  - m. 1.1.5. Data Quality Assurance - The Bidder did not meet the State's requirement related to data quality assurance.
  - n. 1.1.6.B Reports - The Bidder did not meet the State's requirement related to reports.
  - o. 1.3. Training – The Bidder did not meet the State's requirement related to training.
- 2. Schedule A, Statement of Work, Sections 3 – 5** 13/15
- The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:
- a. 5.1 Project Plan – The Bidder did not meet the State's requirement related to the project plan.
- 3. Schedule A, Statement of Work, Section 6 – 9** 10/10
- The Evaluation Team determined that overall, the responses were satisfactory.

4. Vendor Questions Worksheet 5/5  
 The Evaluation Team determined that overall, the responses were satisfactory.
5. Vendor Questions Worksheet – Experience 10/20  
 The Evaluation Team determined that overall, the responses were mostly unsatisfactory and the following deficiencies were noted:
- a. The size of the Bidder’s project experience did not meet the State’s requirement related to experience.

**Total Score: 62.5/100**

**B. Carahsoft Technology Group Corp**

The Evaluation Team determined that Carahsoft Technology Group Corp based on a score of 62.5, did not meet the requirements of this RFP. This determination was accomplished by evaluating their responses to the Technical Evaluation Criteria.

1. Schedule A, Statement of Work, Sections 1 – 2 32/50  
 The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:
- a. 1.1.A. Survey Questionnaire Design - The Bidder did not meet the State's requirements related to questionnaire design.
  - b. 1.1.B. Employee Respondent Demographic Data – The Bidder did not meet the State's requirements related to employee demographic data.
  - c. 1.1.C. Branding – The Bidder did not meet the State's requirements related to branding.
  - d. 1.1.D. Data Security – The Bidder did not meet the State's requirements related to data security.
  - e. 1.1.E. Communication Plan and Templates - The Bidder did not meet the State's requirements related to the communication plan and templates.
  - f. 1.1.F. Segmentation/Survey Coverage - The Bidder did not meet the State’s requirement of benchmarking and the capturing of historical data.
  - g. 1.1.G. Respondent Email List - The Bidder did not meet the State’s requirement related to the respondent email list.
  - h. 1.1.H. Survey IT Checklist and Testing - The Bidder did not meet the State’s requirement related to survey IT checklist and testing.
  - i. 1.1.I. Survey ADA Compliance, Usability and Testing - The Bidder did not meet the State’s requirement related to ADA Compliance, Usability and Testing.
  - j. 1.1.I.1. The Bidder did not meet the State’s requirement related to this section.

- k. 1.1.1.2. Digital Standards Review - The Bidder did not meet the State's requirement related to digital standard review.
- l. 1.1.1.3. Warranty - The Bidder did not meet the State's requirement related to warranty.
- m. 1.1.2.B. Help Desk Support - The Bidder did not meet the State's requirement related to help desk support.
- n. 1.1.3.B. Preformatted Reports - The Bidder did not meet the State's requirement related to preformatted reports.
- o. 1.1.3.C. Custom Reports - The Bidder did not meet the State's requirement related to custom reports.
- p. 1.1.3.D. Summary Reports - The Bidder did not meet the State's requirement related to summary reports.
- q. 1.1.5. Data Quality Assurance - The Bidder did not meet the State's requirement related to data quality assurance.
- r. 1.1.6.B Reports - The Bidder did not meet the State's requirement related to reports.
- s. 1.2. Transition – The Bidder did not meet the State's requirement related to transition.
- t. 1.3. Training – The Bidder did not meet the State's requirement related to training.
- u. IT Policies, Standards and Procedures (PSP) - The Bidder did not meet the State's requirement related to PSP.
- v. Acceptable Use Policy - The Bidder did not meet the State's requirement related to acceptable use policy.
- w. SOM Digital Standards - The Bidder did not meet the State's requirement related to digital standards.
- x. ADA Compliance - The Bidder did not meet the State's requirement related to ADA compliance.
- y. 1.4 User Type and Capacity - The Bidder did not meet the State's requirement related to user type and capacity.
- z. 1.5. End-User Operating Environment - The Bidder did not meet the State's requirement related to end-user operating environment.
- aa. 1.7. Hosting - The Bidder did not meet the State's requirement related to hosting.
- bb. 2.2. Delivery - The Bidder did not meet the State's requirement related to delivery.

**2. Schedule A, Statement of Work, Sections 3 – 5**

7.5/15

The Evaluation Team determined that overall, the responses were mostly unsatisfactory, and the following deficiencies were noted:

- a. 5.1 Project Plan – The Bidder did not meet the State’s requirement related to the project plan.

**3. Schedule A, Statement of Work, Section 6 – 9** 3/10

The Evaluation Team determined that overall, the responses were mostly unsatisfactory, and the following deficiencies were noted:

- a. 9 Service-Level Agreement - The Bidder did not meet the State’s requirement related to service-level agreements.

**4. Vendor Questions Worksheet** 0/5

The Evaluation Team determined that overall, the responses were mostly unsatisfactory, and the following deficiencies were noted:

- a. Subcontractor letter and referencing outside material and links throughout the proposal does not meet the State’s requirements as identified in the proposal instructions.

**5. Vendor Questions Worksheet – Experience** 20/20

The Evaluation Team determined that overall, the responses were satisfactory.

**Total Score: 59/100**

**C. Custom Insight LLC**

The Evaluation Team determined that Custom Insight based on a score of 93.5, did meet the requirements of this RFP. This determination was accomplished by evaluating their responses to the Technical Evaluation Criteria.

**1. Schedule A, Statement of Work, Sections 1 – 2** 48/50

The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:

- a. 1.1.G. Respondent Email List - The Bidder did not meet the State’s requirement related to respondent email list.
- b. 1.1.3.D. Summary Reports - The Bidder did not meet the State’s requirement related to summary reports.

**2. Schedule A, Statement of Work, Sections 3 – 5** 14.5/15

The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:

- a. 4.7. Key Personnel – The Bidder did not meet the State’s requirement related to key personnel.

**3. Schedule A, Statement of Work, Section 6 – 9** 10/10

The Evaluation Team determined that overall, the responses were satisfactory.

**4. Vendor Questions Worksheet** 4/5

The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:

- a. The Bidder's response did not include gross annual sales.

**5. Vendor Questions Worksheet – Experience 17/20**

The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:

- a. The Bidder's scope of projects did not meet the State's requirement.

**Total Score: 93.5/100**

**D. Hollingsworth Consulting LLC**

Hollingsworth Consulting LLC has not met the requirements of being responsive and responsible due to not answering the detailed questions throughout the Statement of Work.

**Total Score: NO SCORE**

**E. Spencer Stuart Star US Inc. /Kincentric**

The Evaluation Team determined that Kincentric based on a score of 80, did meet the requirements of this RFP. This determination was accomplished by evaluating their responses to the Technical Evaluation Criteria.

**1. Schedule A, Statement of Work, Sections 1 – 2 38.5/50**

The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:

- a. 1.1.D. Data Security – The Bidder did not meet the State's requirements related to data security.
- b. 1.1.F. Segmentation/Survey Coverage - The Bidder did not meet the State's requirement of benchmarking and the capturing of historical data.
- c. 1.1.G. Respondent Email List - The Bidder did not meet the State's requirement related to respondent email list.
- d. 1.1.H. Survey IT Checklist and Testing - The Bidder did not meet the State's requirement related to survey IT checklist and testing.
- e. 1.1.I.1. The Bidder did not meet the State's requirement related to this section.
- f. 1.1.I.4. The Bidder did not meet the State's requirement related to this section.
- g. 1.1.3.B. Preformatted Reports - The Bidder did not meet the State's requirement related to preformatted reports.
- h. 1.1.3.C. Custom Reports - The Bidder did not meet the State's requirement related to custom reports.

- i. 1.1.6.A Overall Reports - The Bidder did not meet the State’s requirement related to overall reports.
  - j. 1.1.6.B Department templates - The Bidder did not meet the State’s requirement related to department templates.
  - k. 1.1.6.C Individual Agency reports - The Bidder did not meet the State’s requirement related to individual Agency reports.
  - l. 1.7. Hosting - The Bidder did not meet the State’s requirement related to hosting.
  - m. 2.2. Delivery - The Bidder did not meet the State’s requirement related to delivery.
- 2. Schedule A, Statement of Work, Sections 3 – 5** 11/15
- The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:
- a. 4.1. Contractor Representative – The Bidder did not meet the State’s requirement related to contractor representative.
  - b. 4.10. Security – The Bidder did not meet the State’s requirement related to security.
  - c. 5.1 Project Plan – The Bidder did not meet the State’s requirement related to the project plan.
- 3. Schedule A, Statement of Work, Section 6 – 9** 9.5/10
- The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:
- a. 8.1. Invoice Requirements – The Bidder did not meet the State’s requirement related to invoice requirements.
- 4. Vendor Questions Worksheet** 4/5
- The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:
- a. The Bidder’s response did not include gross annual sales.
- 5. Vendor Questions Worksheet – Experience** 17/20
- The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:
- a. The Bidder’s response did not include dollar value on any experiences listed.

**Total Score: 80/100**

**F. Korn Ferry**



The Evaluation Team determined that Korn Ferry based on a score of 54, did not meet the requirements of this RFP. This determination was accomplished by evaluating their responses to the Technical Evaluation Criteria.

1. Schedule A, Statement of Work, Sections 1 – 2 26/50

The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:

- a. 1.1.A. Survey Questionnaire Design - The Bidder did not meet the State's requirements related to questionnaire design.
- b. 1.1.B. Employee Respondent Demographic Data – The Bidder did not meet the State's requirements related to employee demographic data.
- c. 1.1.D. Data Security – The Bidder did not meet the State's requirements related to data security.
- d. 1.1.G. Respondent Email List - The Bidder did not meet the State's requirement related to respondent email list.
- e. 1.1.H. Survey IT Checklist and Testing - The Bidder did not meet the State's requirement related to survey IT checklist and testing.
- f. 1.1.I. 1-4 Survey ADA Compliance, Usability and Testing - The Bidder did not meet the State's requirement related to ADA Compliance, Usability and Testing.
- g. 1.1.2.A. Response Rate Monitoring - The Bidder did not meet the State's requirement related to response rate monitoring.
- h. 1.1.2.B. Help Desk Support - The Bidder did not meet the State's requirement related to help desk support.
- i. 1.1.3.B. Preformatted Reports - The Bidder did not meet the State's requirement related to preformatted reports.
- j. 1.1.3.D. Summary Reports - The Bidder did not meet the State's requirement related to summary reports.
- k. 1.1.3.H. Technical Support - The Bidder did not meet the State's requirement related to technical support.
- l. 1.1.6. Reports - The Bidder did not meet the State's requirement related to reports.
- m. 1.2. Transition – The Bidder did not meet the State's requirement related to transition.
- n. 1.3. Training – The Bidder did not meet the State's requirement related to training.
- o. IT Policies, Standards and Procedures (PSP) - The Bidder did not meet the State's requirement related to PSP.

- p. Acceptable Use Policy - The Bidder did not meet the State’s requirement related to acceptable use policy.
- q. SOM Digital Standards - The Bidder did not meet the State’s requirement related to digital standards.
- r. ADA Compliance - The Bidder did not meet the State’s requirement related to ADA compliance.
- s. 1.4 User Type and Capacity - The Bidder did not meet the State’s requirement related to user type and capacity.
- t. 1.5. End-User Operating Environment - The Bidder did not meet the State’s requirement related to end-user operating environment.
- u. 1.7. Hosting - The Bidder did not meet the State’s requirement related to hosting.
- v. 2.2. Delivery - The Bidder did not meet the State’s requirement related to delivery.

**2. Schedule A, Statement of Work, Sections 3 – 5 8.5/15**

The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:

- a. 4.3. Program Manager - The Bidder did not meet the State’s requirement related to program manager.
- b. 4.5. Technical Support, Repairs and Maintenance - The Bidder did not meet the State’s requirement related to technical support, repairs and maintenance.
- c. 4.7. Key Personnel - The Bidder did not meet the State’s requirement related to key personnel.
- d. 4.8. Organizational Chart - The Bidder did not meet the State’s requirement related to the organizational chart.
- e. 5.1 Project Plan – The Bidder did not meet the State’s requirement related to the project plan.

**3. Schedule A, Statement of Work, Section 6 – 9 2.5/10**

The Evaluation Team determined that overall, the responses were mostly unsatisfactory, and the following deficiencies were noted:

- a. 8.1. Invoice Requirements - The Bidder did not meet the State’s requirement related to invoice requirements.
- b. 9 Service-Level Agreement - The Bidder did not meet the State’s requirement related to service-level agreements.

**4. Vendor Questions Worksheet 0/5**

The Evaluation Team determined that overall, the responses were unsatisfactory, and the following deficiencies were noted:

- b. Subcontractor letter and referencing outside material and links throughout the proposal does not meet the State’s requirements as identified in the proposal instructions.

**5. Vendor Questions Worksheet – Experience** 17/20

The Evaluation Team determined that overall, the responses were mostly satisfactory, but the following deficiencies were noted:

- a. The Bidder’s response did not include dollar value on any experiences listed.

**Total Score: 54/100**

**IV. Technical Evaluation Summary**

	Selection Criteria	Weight	Baton Global	Carahsoft Technology	Custom Insight	Kincentric	Korn Ferry
<b>1</b>	Schedule A, Statement of Work, Sections 1 - 2	<b>50</b>	<b>24.5</b>	<b>32</b>	<b>48</b>	<b>38.5</b>	<b>26</b>
<b>2</b>	Schedule A, Statement of Work, Sections 3 - 5	<b>15</b>	<b>13</b>	<b>7.5</b>	<b>14.5</b>	<b>11</b>	<b>8.5</b>
<b>3</b>	Schedule A, Statement of Work, Section 6 - 9	<b>10</b>	<b>10</b>	<b>3</b>	<b>10</b>	<b>9.5</b>	<b>2.5</b>
<b>4</b>	Vendor Questions Worksheet	<b>5</b>	<b>5</b>	<b>0</b>	<b>4</b>	<b>4</b>	<b>0</b>
<b>5</b>	Vendor Questions Worksheet - Experience	<b>20</b>	<b>10</b>	<b>20</b>	<b>17</b>	<b>17</b>	<b>17</b>
	<b>Total</b>	<b>100</b>	<b>62.5</b>	<b>62.5</b>	<b>93.5</b>	<b>80</b>	<b>54</b>

**V. Oral Presentations/Demonstrations**

All bidders who passed technical evaluation were invited to take part in Oral Presentations. Bidder’s presentations were not scored but were considered as part of the best value determination.

**VI. Pricing Summary**

Pricing was evaluated for the bidders who passed technical. The following is a summary of their price proposals:

	<b>Deliverable</b>	<b>Custom Insight</b>	<b>Kincentric</b>
1	<b>Pre-Survey Activities</b>	\$60,000	\$222,855
2	<b>Survey Administration</b>	\$30,000	\$57,810
3	<b>Post Survey Activities</b>	\$80,000	\$330,225
4	<b>Additional Activities</b>	\$10,000	\$405,595
	<b>Total Price</b>	<b>\$180,000</b>	<b>\$1,087,500</b>

### VII. Negotiations

Custom Insight was asked to submit second round pricing after the oral presentation.

	<b>Deliverable</b>	<b>Custom Insight</b>
1	<b>Pre-Survey Activities</b>	\$100,000
2	<b>Survey Administration</b>	\$30,000
3	<b>Post Survey Activities</b>	\$80,000
4	<b>Additional Activities</b>	\$10,000
	<b>Total Price</b>	<b>\$220,000</b>

### VIII. Award Recommendation

Award recommendation is made to the responsive and responsible Bidder who offers the best value to the State of Michigan. Best value is based on the proposal meeting the minimum point threshold and offering the best combination of the factors stated in the *Proposal Instructions Evaluation Process* section, and price.

Custom Insight provided the best value to the State. Best value factors for Award Recommendation include platform useability, response time, and price.

As part of the best value determination, overall economic impact to the State of Michigan was considered and is not a determinative factor in making this award.

Award Recommendation is made to Custom Insight LLC in the amount of \$220,000.