

NEOGOV

# 72

*Questions to Include in a*

# PERFORMANCE MANAGEMENT RFP

*for Government*

In order to select the right software that fits your organization's needs and meets the specific processes of your government agency, **you should carefully consider the questions to include in your Request for Proposal (RFP).**

While some vendors claim their solutions can be configured to accommodate specific public sector requirements, **making adaptations or conceding to workarounds can take significant resources** and extend the implementation timeline considerably. Whereas, other solutions may already offer those same features.

**To help you evaluate performance management solutions, here are 72 questions that can be adapted to fit your RFP needs:**

## FEATURES / FUNCTIONALITY

1. Does your performance management system allow for both traditional performance reviews and 360-degree reviews?
2. Are 360-degree reviews and ongoing feedback settings configurable?
3. Does your product offer journal entry-type capability where managers can add notes about employees throughout the year that can be referenced later during performance reviews?
4. Does your system make notes accessible during the annual review?
5. Can supplemental documentation in various file types such as PDF, JPEG, and PNG be uploaded?
6. Can other employees and other managers in the organization send notes to managers about their direct reports?
7. Does your product provide the ability to set up check ins at whatever cadence you choose?
8. Can you customize performance review deadlines by department so the whole organization doesn't have to be reviewed at the same time?
9. Can notifications for overdue tasks be scheduled to send to stakeholders?
10. Does your performance management system provide the ability to configure the frequency of communication "check ins" between supervisors and employees (such as quarterly or semi-annually)?
11. Can you create and edit rating scales within the system? Is it possible to add weighting?
12. Does the system have the ability for a manager to view and update only their direct reports' performance evaluations?
13. Does the system allow you to create a Performance Improvement Plan with multiple rating areas within the system?
14. Can the supervisor and employee create a development plan and modify or update the plan throughout the year?
15. Can employees write rebuttals in response to their performance reviews?
16. Does the performance management system provide a user-friendly tool for configuring workflows without the need for vendor support or services?
17. Does the system have a competency library?
18. Does the system have writing assistance?
19. Is there a language flagger when inappropriate words are used?
20. Does your system include organizational charts for employees to view their team and the organization's hierarchy?
21. Can you upload employee photos to their profiles?
22. Can you customize approval hierarchy (e.g. Manager/Director approves direct reports/subordinates)?
23. Does the system allow employees to make notes on the evaluation form prior to evaluation?
24. Does the performance management system allow for peer reviews?
25. Does the system allow for employee self-ratings?
26. Can you easily set up tasks to define employee goals and competencies with clear calls to action?
27. Does the system allow for surveys from individuals outside the organization?
28. Does your system have the ability for managers to monitor goal progress and status for their team from a dashboard or via alerts?
29. Is your solution optimized for use on mobile devices?
30. Can a manager assign the same goal to many employees within their chain of command?
31. How does a manager stay informed as to the status of goals for their employees?
32. Does the solution support multiple categories of employees (hourly, salaried, seasonal, etc.)?
33. What additional features did we not ask about that you believe would support our organization?

## COMPLIANCE / REPORTING

34. What reporting capabilities does your system offer?
35. Does the HR Administrator have the ability to generate reports?
36. Can reports be exported in various formats and if so which ones?
37. Can an employee refuse to sign their performance review?
38. Is there a validation process for managers built into the system?
39. Does the system maintain performance feedback and ratings history?
40. What types of historical data does your system maintain?
41. How long does your system maintain historical information?
42. Does the system maintain a history of development goals and assessments?
43. What auditing capability is available?
44. Does the system include the ability to upload documentation for the appropriate review?

## SECURITY

45. Is the infrastructure completely Cloud-based and fully managed by the vendor?
46. Are background checks required for all vendor employees who have access to the software?
47. Is sensitive data and personally identifiable information accessible to the vendor's employees?
48. Can you configure role-based access and permissions within the product?
49. Can you customize the user password expiration date?
50. Is the performance management system NIST 800.53 compliant?
51. Is the performance management system SOC2 Type II 5 Principles certified?
52. Are internal and external security scans completed at regular intervals? If so, at what cadence?
53. Are third-party penetration tests conducted on the performance management system?
54. Is the performance management system SAML 2.0 ready for single-sign on from anywhere?
55. Is the information in the product stored on servers within FISMA-certified data centers in the US?
56. Is all data encrypted at rest and in transit?
57. Does the vendor claim ownership of the agency data it processes?

## IMPLEMENTATION

58. What is the typical timeline for a performance management system implementation for an organization of our size?
59. How does your organization support customers throughout implementation?
60. Does your performance management system allow customers to configure their own system?
61. What is the cost of your performance management system?
62. How often do you bill for your performance management system?

## CUSTOMER SUPPORT

63. What kind of customer training is provided before, during, and after implementation?
64. What forms of customer support are included with the subscription?
65. What are the days/hours support is available?
66. How do you support organizations of different sizes?
67. What is the average size of the organizations your company serves?
68. Please include contact information for a customer reference, including contact name, title, phone number, and email.

## TRAINING / USABILITY

69. Is the user interface easy to navigate?
70. Is your performance management system easy for HR and non-HR employees to learn?
71. Describe the training that your team makes available to customers.
72. Does your performance management system support mobile access?