



June 13, 2019

# **Request for Proposal For Team Member Engagement Survey**

SANY America  
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### 1. **About SANY America**

SANY Group is a global corporation with about 70,000 employees in more than 150 countries. The Company offers a complete scope of construction machines, such as excavators, wheel Loaders, concrete pumps, road construction machines, container handlers, crane and crane vehicles, and earth drilling, harbor, mining and earth moving machinery, wind generation, and forklifts. Headquartered in China, SANY is one of the Top 5 heavy machinery manufacturers in the world, generating revenues of over \$10 billion, with about a third of its business outside of China. SANY is No.1 in market share in the global concrete machinery business, No. 1 in market share in the Chinese excavator market and No. 3 in the Chinese lifting crane market. SANY is also the largest Chinese exporter of excavators, crawler cranes, hydraulic cranes and drill rigs.

In the past 4 years, SANY has established 10 overseas companies, including four facilities in the U.S., Germany, India and Brazil, all of which provide fully functioning R&D, manufacturing, marketing, sales and service operations. In addition, there are six SANY regional sales and service companies covering Asia Pacific, the Mideast, South Africa, North Africa, Pan-Russia and Latin America. Within this strategic footprint, SANY is able to serve customers around the world.

SANY America manufactures, sells and supports construction and material handling equipment, hydraulic excavators, port equipment, container reach stackers, empty container handlers, and heavy forklifts, including crawler cranes, rough terrain cranes, truck cranes, motor graders, wheel loaders and backhoes. SANY America's sales area includes the United States, Canada, Mexico and Central America. SANY America's headquarters is in Peachtree City, Georgia, and the facility has 340,000 square feet of manufacturing space and 60,000 square feet of office space.

### 2. **Purpose**

SANY America is requesting proposals for providing Team Member engagement surveys. Interested organizations may submit a proposal ("Proposal") containing information requested in this RFP. SANY America will select one organization to perform the required services. The organization will provide services as stated in the Statement of Work (Section 6 of this document).

### 3. **General Requirements**

- a. All correspondence or questions concerning the RFP should be addressed to Scott Beck at [sbeck@sanyamerica.com](mailto:sbeck@sanyamerica.com) or (678) 251-2849.
- b. **Proposal are due by July 8, 2019.** All late proposal will be rejected.
- c. All proposals must be signed by a duly authorized representative of the firm.
- d. SANY America reserves the right to reject all proposals.
- e. This Request for Proposals (RFP) is not a guarantee of purchase.
- f. SANY America reserves the right to amend any segment of the RFP prior to announcement of a successful Respondent and award of the agreement. If a change occurs in SANY America's requirements resulting in a decision to modify the RFP's scope of work or statement of requirements, such change will be communicated in writing as an addendum to the RFP. In the event of a change, all Respondents will be provided the opportunity to revise their proposal to accommodate the amendment.
- g. All proposal pricing must be good for a period of 90 days from the date of opening.
- h. Proposals shall be prepared simply and economically, providing a straightforward description of the respondent's capabilities to satisfy the requirements of this RFP.

Emphasis should be on completeness and clarity of content, including all attachments and work samples.

- i. There is no express or implied obligation for SANY America to reimburse firms for any expenses incurred in preparing proposals in response to this request.

#### **4. Evaluation Process**

- a. SANY America reserves the right to select the proposal most responsive to the needs of the organization.
- b. SANY America reserves the right to award the agreement to the firm who will best serve the interests of the organization at the organization's sole discretion. SANY America reserves the right based upon its deliberations and in its opinion, to accept or reject any or all proposals. SANY America also reserves the right to waive minor irregularities or variations to specifications in the process.
- c. SANY America reserves the right, before awarding the agreement, to require a firm to submit any evidence of qualifications as the organization may deem necessary and to consider any evidence available such as financial, technical and other capabilities, including performance experience with past and present users.
- d. SANY America reserves the right to request additional information or clarifications and allow corrections of errors or omissions. SANY America reserves the right to make those decisions after receipt of responses.
- e. SANY America will review all proposals and make a determination based on the following factors:
  - i. Professional capacity to take on the work
  - ii. Ability to perform within time and budget constraints
  - iii. Evaluation of potential work plans
  - iv. Previous work experience and performance with similar organizations
  - v. Recommendations by references
  - vi. Other pertinent information submitted
  - vii. Proposed fee structure
- f. SANY America may invite one or more finalist to have key personnel who would be engaged in provision of the services make presentations and/or discuss the proposal. SANY America will not be liable for expenses incurred in attending this meeting.

#### **5. Qualifications**

- a. The awarded firm shall have relevant experience providing team member engagement survey services to organizations of similar size and scope (100 employees) with similar industry.
- b. The vendor-consultant will demonstrate current and past experience with respect to conducting employee engagement surveys with organizations to achieve a high survey participation rate.
- c. Evidence will be included that demonstrates similar successful implementations and experience achieving high employee participation rates.

#### **6. Scope of Work**

- a. Deliverables:
  - i. The survey consultation and design parameters will include the following items:
    - 1. Provide a secured survey link via e-mail to invite employees for participation.

2. Provide ease of administration, with reliable, valid reporting of results that are reasonable to interpret and communicate.
  3. Allows for timely final results to SANY America with the ability to monitor survey progress during open survey timeframe.
  4. Promotes a high participation rate with an effective communication strategy, and with questions that are designed to support ease of understanding and completion for a broad audience. Survey completion should be less than 30 minutes, with consideration to the number of questions, language and formatting.
  5. Ensures the design of the survey has a high level of validity and statistically sound, with questions that based on proven research.
  6. Ensures strictest confidentiality and anonymity.
  7. Provides relevant industry benchmark comparisons and flexible reporting so data results may be reported by levels and teams.
  8. Ability to integrate and build upon existing data and benchmarking results to create survey development and reporting.
  9. Ensures sustainability and flexibility with the ability to repeat the organization-wide survey, and conduct multiple pulse check surveys, to monitor progress and effectiveness of action items.
  10. Summarizes and interprets results and provides recommendations to drive engagement at SANY America.
  11. Identifies the drivers of employee engagement to enable a focused approach to action plan based on measured results, and provides follow-up tools, resources, and support to effectively implement action plans.
- b. The awarded firm will be expected to work closely with SANY America stakeholders and provide the following:
- i. Consult, develop, and customize a survey for SANY America approval.
  - ii. Implement and host an electronic survey with data stored in a manner that is easy to access and data that can be readily manipulated for meaningful analysis and targeted distribution
  - iii. Recommend leading practices in team member engagement, and provide communication strategy supports for pre, during and post survey time periods to successfully reach targeted survey participation rates.
  - iv. Demonstrate proven ability for comparative analysis with relevant industry sectors, and a tabulation method that is statistically relevant.
  - v. Generate flexible reports based on findings at levels of organization and team level with the understanding that anonymity of sufficient numbers is to be taken into account.
  - vi. Present results to Executive Leadership Team and other groups as required.
  - vii. Provide post survey support with consultation and interpretation of results, as well as support tools, templates, and resources to effectively take action on engagement results.
  - viii. Work with SANY America confidentiality and security of surveys and survey data throughout the implementation, assessment and delivery of results.
  - ix. Provide a detailed explanation of implementation and post-implementation process steps to include: Identify how much lead time is needed (in days or

weeks) to consult with SANY America, develop, and launch an engagement survey. Identify other helpful information that can ensure a successful implementation and launch of the engagement survey by the target “date” of early-mid September 2019.

- x. Provide capabilities and offerings you have available for providing engagement-related support, tools, resources via mobile platform.

## **7. Survey Methodology and Resources**

- a. A description will need to be provided on the survey analysis methodology with a statistical approach and defense to both qualitative and quantitative measures, benchmark and industry comparators, process to determine survey questions which are relevant to SANY America, and the process for analyzing and interpreting the data. The description will demonstrate an evidence-based approach and model to support what and how the data will be measured, and the methods used to achieve and maintain anonymity of participants and overall confidentiality. It will address a framework for interpreting results and an action planning approach that includes practical and manageable steps to improve and sustain key areas of focus. The survey will produce results that can be benchmarked against prior survey results and with other comparable organizations with similar characteristics.
- b. The survey will be developed to allow for customized language and questions (Mandarin Chinese and English). It will take into the account the workforce environment and offer multiple ways for communication, roll out, survey completion and collection of survey responses.
- c. A recommended communications strategy will be provided, which will include timelines and resources required to deliver the strategy. It will include an education plan for key stakeholder groups with a framework for overall approach and practice.
- d. The awarded firm will provide samples of communication tools and methods to achieve a high level of team member participation. Key methods and messages for communication of change, survey methodology and interpreting and sharing/rolling out results are to be provided.

## **8. Technical Requirements**

- a. The survey will be in electronic format that is ready to move to production. A description of any technical requirements will be provided that considers team member access at work or elsewhere to complete the survey. The requirements needed for the survey to be administered along with the ability to monitor progress and access reporting will be identified and included.

## **9. Data Management and Reporting**

- a. The awarded firm will have and utilize consulting expertise to provide generally accepted principles and practices for analysis and scientific statistical support, explanations and defenses for the model/data. The vendor/consultant will provide key insights and analysis of survey results; provide relevant comparable benchmarks, qualitative data theming and support to map previous data.
- b. A full description and reporting samples of survey results will be provided. The vendor-consultant will provide information on how SANY America will be able to manage the reporting data, and how the data can be provided with varying views for the different levels and teams. Samples of reporting options for graphs, presentations will be

provided, and consideration will be given to how this data can be compiled with other data using Excel, Access or other formats. Details will be provided on how the data is stored, how access will be permitted over a period of time, and any restrictions to the data. Key and relevant benchmark comparisons will be included with clear geographical relevance.

#### **10. Post Survey Action Tools and Supports**

- a. Recommendations and samples for post survey action plans will be provided. Particular attention to any leadership and team tools will be made that allows SANY America to highly engage in post survey actions, create a deep understanding of results, and enhance communication on the key items that will continue to enhance and drive engagement at all levels of the organization.

#### **11. Proposal Requirements and Format**

- a. Firms shall provide a straight-forward, concise description of the firm's capability to satisfy the requirements of this RFP and perform the work described in this RFP. Prepare your responses to this RFP in the format and sequence specified below. Respond specifically to each item in the order provided.
  - i. Format
    1. Responses are to be sent electronically via email to [sbeck@sanyamerica.com](mailto:sbeck@sanyamerica.com).
    2. The responses may be in the form of MS Word, Excel, PDF, or PowerPoint.
    3. Separate and identify each section in the sequence provided.
  - ii. Firm Information
    1. Provide a brief description of your firm, including but not limited to the following:
      - a. Name, telephone number, and email address of representative of the firm authorized to discuss the proposal.
      - b. Address of the office of the firm.
      - c. Number of years in business under current name and any past corporate names or affiliations.
  - iii. Experience
    1. Describe your firm and its capabilities. In particular, support your capacity to create a survey and build logic to meet SANY America's objectives.
    2. Detail the firm's direct experience in providing expertise, market research, consulting services and technical assistance in employee engagement surveys.
    3. Indicate who from your firm would be involved in providing services to SANY America. Provide appropriate background information for each such person and identify his or her responsibilities.
    4. Provide a minimum of three (3) client references for similar services performed.
  - iv. Approach, Plan of work and Timeline
    1. Explain the firm's approach and suggested work plan. Suggest project milestones and provide estimates of project start dates and time to completion.

- a. SANY America expects to release the survey to team members in September 2019.
2. Explain the firm's methodology to reach desired groups.
3. Demonstrate your firm's ability to move the project from initiation through finalizing.
4. Suggest project milestones and provide estimates of project start dates and time to completion.
5. Demonstrate your firm's ability to be vigilant about the reliability and validity of data and analysis
6. Demonstrate your firm's ability to provide clear, concise and action oriented reports
7. ***See Scope of Work for additional requirements***
- v. Questions to be Answered
  1. What would you need from SANY America to complete this project?
  2. Which formats can you provide to deliver the team member engagement survey?
  3. Where will the survey be maintained? Is it cloud based or will it be stored on SANY's server?
  4. Is there anything that SANY America has not identified in the RFP that would benefit the organization in completion of this survey?
- vi. Fees and Services
  1. Describe the way you propose to be compensated for services provided. The cost of the service is one of the factors that will be considered in awarding this agreement. Please provide a thorough breakdown of your proposed fees for this engagement.
  2. Hourly rates for additional services and other expenses not included in the proposed scope of work.
- vii. Additional Documentation
  1. Provide a sample of your firm's agreement for these services including terms and conditions.
  2. Discuss any topics not covered in this RFP that you would like to bring to SANY America's attention.

**NOTE: Proposals are due at close of business on July 8, 2019.**