



**Request for Proposals For A
Weatherization Software**

**Proposals accepted until:
Friday, January 6th, 2023**

**Rolling Plains Management Corporation
118 N. 1st Street
Crowell, Texas 9227
940-684-1571**

Rolling Plains Management Corporation is an equal opportunity employer and encourages all Historically Underutilized Businesses and Disadvantaged Business Enterprises to participate.

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I. GENERAL INFORMATION

Rolling Plains Management Corporation (RPMC) of Baylor, Cottle, Foard, Hardeman, and Wilbarger Counties was formed in 1965 to provide services to low-income individuals as Economic Opportunities Advancement Corporation of Cottle, Foard, Hardeman, and Wilbarger Counties through a volunteer parent support group. During the 55 years that RPMC has served north Texas, the programs and services have expanded beyond early childhood education to include: transportation, utility assistance, weatherization, childcare assistance, and self-sufficiency services. The service area has expanded from four counties to 28 counties. The available services vary based on service area.

i. Purpose

The purpose in soliciting Request for Proposals (RFP) is to operate Weatherization programs using grants from the Texas Department of Housing and Community Affairs, including federally funded programs using DOE and LIHEAP funds along with private sources of grant funds. Rolling Plains Management Corporation (RPMC) is requesting proposals, priced on a fixed price basis, from qualified sources, to provide and deploy up-to-date weatherization software in order to successfully streamline management and auditing processes and procedures.

The system should include, a full range operating and management functions using an Enterprise Content Management (ECM) that suit the Weatherization Department's workflow. The software will be capable of capturing and processing data from the initial application, managing a priority list off of demographic information, providing work orders and invoices, an auditing functionality, and providing a customizable search field filtering options based on stored information.

Also, as a minimum, the system will provide the ability to reduce clutter of paperwork and data duplication, provide accurate billing reports that integrate with the finance software, produce customizable reports, verify case status, capacity to record data offline and flexible data caps. Lastly, the program will be malleable for RPMC administrators. Specifically, the admin will be capable of adding users, adjusting user privileges, password resets, and will have internal contacts in case of system failure.

ii. Contract Type

The winning proposal will be offered a standard firm fixed price three-year contract from **2023** to **2026** with Rolling Plains Management Corporation for the services specified in this proposal. At the option of RPMC, the contract period can be extended and renewed contingent upon funding.

iii. Timeline

The successful proposer agrees to begin providing services as specified in the agreement/contract negotiation notice. Should the work not begin within the specified time, then vendor negotiations may be terminated.

iv. Limitations and Reservations

RPMC reserves the right to accept or reject any and all proposals received as a result of

this request, to negotiate with all qualified sources, or to cancel in part or in its entirety this RFP, if found to be in the best interest of RPMC. This RFP does not commit RPMC to award a contract, to pay any costs incurred for the preparation of proposals or to procure or contract for any services.

RPMC specifically reserves the right to vary the provisions set forth herein any time prior to the execution of a contract where such variance is deemed to be in the best interest of the needs of RPMC. While every effort has been made to ensure the accuracy and completeness of the information in this RFP, RPMC recognizes that the information is not exhaustive in every detail and that all work and materials may not be expressly mentioned in the requirements of the RFP. Therefore, it is the responsibility of the proposer to include in their proposal all software and hardware requirements which are necessary for the full performance of the system. If selected for negotiations, proposer may be required to prepare and submit additional information prior to final vendor(s) selection, in order to reach terms for the provision of services, which are agreeable to both parties.

v. Modification and Renewals

RPMC reserves the right to negotiate a modification or renewal for software services in connection with any executed agreement/contract funded through this RFP without repeating the RFP process for a period of up to five (5) years from the original proposal initiation. Vendor modifications and renewals shall be considered based upon the vendor's ability to meet RPMC needs.

vi. Signatures

The proposal has an authorized signature from the business's representative to bind the offer and shall contain a statement to the effect that the proposal is a firm bid for a thirty (30) day period from the date that the proposal is received by RPMC. The proposal shall also provide the name, title, address and telephone number of the individual(s) with authority to negotiate during the period of proposal evaluation.

II. SCOPE OF WORK

The scope of services describes the elements of the software and technology system that would aid RPMC in our mission of providing quality weatherization services in an efficient and economical manner including the use of an interactive app for assessors and contractors during on-site work. It is RPMC's intent to make the opportunity available to vendors to offer proven software products that will address the functional elements required by RPMC to adequately meet the weatherization department needs. The specifications not addressed are not intended as an omission in regards to the vendor's software product/IT technology. A full-functioning software package is required to provide for most, if not all of the specifics.

III. RFP TIMETABLE

RPMC reserves the right to adjust these time frames if a critical addendum is required or if the proposal deadline needs to be extended due to unforeseen circumstances in the best interest of RPMC.

RFPs must be emailed to David Smith at David.Smith@rollingplains.org by 5:00PM (CST) on Friday, January 6th, 2023.

<u>Action</u>	<u>Dates</u>
Public Media Notice of RFP	Monday, Dec. 12, 2022
Bidder's Conference	Thursday, Dec. 15, 2022
Deadline for Question Submission	Thursday, Dec. 29, 2022 @12:00PM [CST]
Final Addendum of Q&A Posted	Friday, Dec. 30, 2022
Deadline for Receipt of Proposal Openings	Friday, Jan. 6, 2023 @5:00PM [CST]
Proposal Evaluations	January 9—13, 2023
Interviews/Presentations/Demonstrations	January 16—20, 2023
Final Selections	Monday, Jan. 23, 2023
Contract Awarded	Wednesday, Jan. 25, 2023

The Bidder's Conference will take place on **Thursday, December 15th, 2022**. Please join the meeting from your computer, tablet or smartphone using the following link:

Rolling Plains WX Bidder's Conference
Thu, Dec 15, 2022 10:30 AM - 11:30 AM (CST)

Please join my meeting from your computer, tablet or smartphone.

<https://meet.goto.com/312367861>

You can also dial in using your phone.

United States (Toll Free): [1 866 899 4679](tel:18668994679)

United States: [+1 \(571\) 317-3116](tel:+15713173116)

Access Code: 312-367-861

The meeting will be recorded if unable to attend. Please email David Smith to attain recording.

IV. SUBMISSION GUIDELINES

All bid submissions should include a signed Letter of Submittal by an authorized person with the authority to bind the offer.

The deadline to email proposals to **David Smith** at **David.Smith@rollingplains.org** by **5:00PM** (CST) on **Friday, Jan. 6, 2023**. No hard copies will be accepted at this time.

All questions concerning this RFP packet should be directed to:

David Smith
RPMC: Weatherization
PO Box 490
Crowell, Texas 79227

Or by email at **David.Smith@rollingplains.org**. Any questions submitted will be posted or communicated back to bidders via RPMC website [reference RFP Timeline for exact dates].

V. EVALUATION CRITERIA TABLE

The selection of a proposal is to be made after a careful evaluation of the proposals received. Each proposal will be evaluated for acceptability with emphasis on the various factors enumerated in the evaluation table. Each factor is assigned a numerical score. The scores will be used to determine vendor(s) with whom negotiations may be conducted. Evaluations will be based upon the Evaluation Criteria Table, for which up to 100 points may be awarded. Total evaluation values of less than 70 points will invalidate a proposal.

Respondents will be evaluated and scored according to the following factors:

Evaluation Criteria	Max Points
WX Software Compatibility	20
Cost	40
Support & Maintenance	15
Implementation & Timeframe	15
Experience & References	5
Certified as a DBE and HUB from through a state Uniform Certification Program	5
Total Points	100

VI. RFP SUBMISSION CHECKLIST

- Required Elements in Response Format **[Reference Heading VII.]**
- Certification of Compliance with Required Elements **[Reference Heading VIII.]**
- Assurances **[Reference Heading IX.]**
- Certifications Regarding Lobbying, Debarment, Suspension and Other Responsibility Matters; Including Drug-free Workplace Requirements and Americans with Disabilities Act **[Reference Heading X.]**
- Email proposals to David Smith at David.Smith@rollingplains.org by 5:00PM (CST) on Friday, Jan. 6, 2023. **[Reference Heading IV.]**

VII. REQUIRED SPECIFICATIONS IN RESPONSE FORMAT

All interested parties shall submit the following information to be considered responsive, as well as demonstrate its capabilities to provide, perform and complete the following tasks:

- Provide a cover letter that contains, at a minimum, the following information: statement of interest; certification that the information and data submitted is true and complete to the best knowledge of the individual signing the letter; respondent's name, address, telephone number, fax number and email address of the individual to contact regarding the submittal: and an authorized partner shall sign the letter.
- Provide a turn-key IT solution which consists of Weatherization Software for content management, data entry, invoicing, work orders, priority list, audit function, export and import, waitlist, demographics, application, storing files and data, work tracking, client contact notes, documentation/attachments, coded fund and search reporting, automated visual status updates, and implementation of software. Vendor to include, but not be limited to house data, material cost, labor cost, weatherization project type, etc. Detail the following points:
 - The proposer shall include a concise summary of the products and services being offered to meet the requirement of this RFP.
 - Proposer should ~~also~~ provide their approach to providing the services.
 - Software should be a complete suite of tools needed to run and automate RPMC's Weatherization Department: house-client application, creating a priority list off the demographic information, generating an invoice, creating a work order, audit functionality, and field filtering searching and reporting.
 - Proposer should also include options and capabilities not listed in this RFP (i.e. automation capabilities, call functions, demographics such as ethnicity/race and economic data, training, query tools, data optimization, etc.).
- Implement the IT solution in a manner in which all RPMC Weatherization Data is migrated to the new system. Detail the following points:
 - The proposer shall describe the approach to meeting the implementation, training, documentation, and transition requirements as well as the "Go-Live" Plan.
 - The proposer shall provide specifications for all recommended software and shall continually assess requirements for the system environment and provide specifications for any recommended changes to the RPMC environment. These specifications should include all software (Weatherization Management Software) required for complete system integration. The proposer will also include optional pricing to establish, test and host the infrastructure defined.
- Provide any type of necessary software (or hardware) integration required for provide a seamless solution. Detail the following points:
 - The proposer shall provide any type necessary software or hardware integration require to provide a seamless solution. The system should deploy in a pilot environment to test all aspects of the system including full integration of

Assessors' iOS tablets and SHAH, Abila, FileBound systems with weatherization software.

- The "Go-Live" Plan should include at least prerequisite activities including training, deployment steps, test plan, and data conversion.
- Develop and conduct training for system administrators, directors, project managers, train the trainers, users, etc. Detail the following points:
 - The proposer shall provide training to ensure all RPMC users have the knowledge and capability necessary to effectively use the system.
 - Training should be conducted at the RPMC facility in Crowell, Texas and at other RPMC facilities as agreed to. A training plan shall be developed by the proposer and reviewed and approved by RPMC and RPMC Management Team.
 - Training shall be conducted from installation through implementation.
 - The proposer shall provide user documentation including manuals, quick reference guides, tutorials, on-line and any configuration or customization documentation.
- Present a solution that will allow for the Finance/Accounting Department software to integrate, or easily access and export information, in order to bill, reconcile, and forecast. Detail the following points:
 - The proposer shall provide a solution to notify the Billing Department that invoices and transactional activities are matched correctly.
 - An approach to notifying or alerting the Finance Department of errors and discrepancies, unintentional or not, and how the matter will be detected in order to resolve the problem in a timely manner.
 - Additionally, the proposer shall provide forecasting methods based on archived Weatherization data.
- Provide warranty, maintenance coverage, and tech support. Describe ongoing software and hardware maintenance plan, as well as support for your proposed solution. Detail the following points:
 - The proposer shall warrant each deliverable for a period of one year after the system is fully implemented and accepted.
 - During the warranty period, the proposer shall be responsible for correcting any issues causing any portion of the system to be inoperable or any issues resulting in inaccurate results produced by the system when the system is used in accordance with product documentation provided by the proposer and without extraordinary actions on the part of RPMC or its users.
- The proposer shall provide a planned maintenance upgrade and data management strategy. The proposed maintenance and tech support agreement shall include at a minimum:
 - Planned software and data upgrades and maintenance schedules. This should include any planned enhancement and any outstanding critical issues that are being addressed.

- Software upgrades procedures to ensure any software version upgrade is compatible with the RPMC IT infrastructure.
 - In a hosted environment, procedure to notify RPMC when the system must be halted to provide scheduled and unscheduled maintenance. Clearly defined roles, responsibilities and coordination processes should be provided.
 - Document all customization or configuration to ensure reproducibility when RPMC upgrades to a new release of the software.
 - Proposer shall submit business continuity procedures and a disaster recovery plan which includes at a minimum recommended hardware and software, a data and security breach plan, and a documented disaster recovery plan.
 - Hosting: RPMC has determined where the software will be hosted (proposer should make recommendations). When hosted at proposer's facility or other pre-determined location, the proposer's hosting services shall include the following features, at a minimum:
 - Type of website security
 - Availability of system
 - Data security
 - Data center tier level
 - Help desk services
 - Backup/disaster recovery plan
- Support twenty (20) or more users and provide the ability to increase scope with additional users and functionality. System must be adaptable to various types of weatherization services and funding requirements. Detail the following points:
- System shall allow user to view application and priority status, develop a work order with customizable funding fields using the assessment form, provide flexible and customizable navigation bars, capture all housing related information using a tablet, allow user to calculate optimal weatherization work to be done, allow user to add a work order and invoice for multiple types of funding source, ability to update housing and client information and status, and ability to integrate current software for efficiency.
- Work closely with RPMC Weatherization Management Team to develop a Project Plan and provide any required documentation including Test/Acceptance Plan, Transition Plan, and "Go-Live" Plan.
- Provide qualifications, certifications and references of key staff to be assigned to this project including technical staff. Detail the following points:
- The proposer will document successful past performance and relevant qualifications and experience.
 - The proposer shall be a company in the business of developing Weatherization Management Software, integration and maintenance for advanced software systems for a minimum of three (3) years within the last five (5) years. Within the last five (5) years, the company should have successfully completed projects that are similar in size and complexity.

- *A list of the proposers last five (5) installations should be included. The installations should reference previous experience in Weatherization and/or Non-Profit organizations.*
- Provide price quotes for software, training, licensing (initial and annual), and maintenance and support. Detail the following points:
 - Proposer shall list additional options/capabilities of software as applicable as well as all recurring costs including software updates, as applicable, and initial set-up fees and warranties.
 - Proposer should provide three (3) and five (5) year price quote options for upfront payment of all reoccurring fees, licenses, and warranties.
 - It is highly recommended that proposers include pricing for multiple package options so that RPMC has the flexibility to build its own product package.
- Indicate the number of years' experience operating such services in a stable, sound manner, as well as, references that include names, addresses and phone numbers of references familiar with the proposer's ability, experience, and reliability in the performance and management of projects of a similar nature.
- Describe your organization's method and capacity to assure quality in the services requested through this RFP.

VIII. CERTIFICATION OF COMPLIANCE WITH REQUIRED ELEMENTS

This is to certify that to the best of the undersigned's knowledge and belief, the information in this proposal is responsive and is true and correct. The undersigned understands that a non-responsive proposal, as defined by RPMC, may not be reviewed and considered for agreement/contract selection. Further, the submission of the proposal has been authorized by the governing body of the proposer.

Efforts will be made by RPMC to utilize small businesses, owned, and controlled by socially and economically disadvantaged individuals and which have been certified as a DBE and HUB from through a state Uniform Certification Program.

Please indicate which best represents your business. (Check)

- HUB Vendor (Historically under- Utilized Business)
- DBE Vendor (Disadvantaged Business Enterprise)
- Minority Owned Business
- Business is part of a larger company (Please specify) _____
- Other (Please specify) _____

(Signature) (Date)

(Print Name and Title)

(Print name and title of person authorized to negotiate a contract if different from person listed above.)

(Organization)

(Address) (City) (State) (Zip)

(Telephone Number)

IX. ASSURANCES

We understand and agree that this proposal is not a contract and does not obligate RPMC to pay for costs incurred in the preparation of this proposal or costs incurred prior to the execution of a written contract or prior to the receipt of funds designated for this program from the funding agency.

We understand and agree that the contract provisions may vary from the provisions set forth in this request, when deemed necessary by the RPMC. However, we agree to abide by the contract provisions contained in the proposed contract.

We understand and agree that we may be subject to an on-site review and must be able and willing to provide documentation of information in the proposal at the request of RPMC prior to execution of a contract.

We understand and agree that RPMC is not required to select the lowest cost proposal.

We understand and agree that any material misrepresentation or deliberate omission of a fact in this proposal may be justification for rejection of the proposal.

We understand and agree to abide by all federal, state and local laws, policies and regulations governing these and those additional rules, which may be promulgated, or as amended, subsequent to the execution of a contract.

We understand and agree that we may be subject to a monitoring review or audit by RPMC. We also understand that we may be required to provide a copy of the most recent audit as part of the contracting process.

We understand and agree to submit this proposal in a good faith effort to provide services to the benefit of economically disadvantaged individuals eligible for services under this proposal.

Signature: _____ Date: _____

Printed Name: _____ Title: _____

X. ADDITIONAL INFORMATION AND CERTIFICATION

i. Certifications

Proposer has certifications regarding the following:

- Lobbying
- Debarment
- Suspension and Other Responsibility Matters
- Drug-Free Workplace Requirements
- Americans with Disabilities Act

ii. Protest Rights

All protests, complaints, grievances, questions or concerns regarding the bid process or the selection of the winning bid must be submitted in writing within 10 days of selection:

Rolling Plains Management Corporation
Debra K. Thomas, Executive Director
PO Box 490
Crowell, Texas, 79227

All protest and complaints shall be referred to the RPMC Executive Committee for resolution.

iii. Standards of Conduct

All procurement transactions shall be conducted in a manner to provide, to the maximum extent practical, open and free competition. In order to ensure objective contractor/vendor performance and eliminate unfair competitive advantage, contractor/vendors who develop or draft specifications and other requirements for RPMC solicitation instruments (RFP's, RFB's, etc.) shall be excluded from competing for such procurement.

Awards shall be made to the contractor/vendor whose offer is responsive to the solicitation and is most advantageous to RPMC, price and other factors considered.

Solicitations shall clearly set forth all requirements that the contractor/vendor must fulfill in order for the offer to be evaluated. Any and all offers may be rejected when in the best interest of RPMC to do so.

Written procedures implementing these policies shall be developed in compliance with applicable federal and state laws and regulations.

iv. Geographic Preference

RPMC shall conduct procurements in a manner that does not give in-State or local geographical preferences in the evaluation of bids or proposals, except in those cases where applicable Federal statutes expressly mandate or encourage geographic preference. This does not preempt State licensing laws.

v. Subcontracting

The services of any vendor(s) awarded from this RFP must be delivered by the vendor named on the proposal. Subcontracting may be allowed if required by the vendor for functioning, support or training requirements, prior authorization may be needed from RPMC.

vi. Conflict of Interest/Nepotism

To avoid any real or apparent conflict of interest or nepotism in the procurement of the bid proposal, no RPMC employee, agent, consultant, officer, family member of employees, official of RPMC and who exercises or has exercised any functions or responsibilities with respect to contract decision making process or gain inside information about such activities, may obtain personal or financial interest or benefit, directly or indirectly, from any award connected with this request. RPMC's employees, officers, and/or agents shall neither solicit nor accept gratuities, favors or anything of monetary value from potential bidders.

vii. Federal/State/Local Compliance

This RFP complies with all federal and state rules and RPMC policies and procedures. Firm awarded will comply with all applicable federal and state rules.