

REQUEST FOR PROPOSALS

Client Services Tracking Software

INQUIRIES AND PROPOSALS SHOULD BE DIRECTED TO:

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TABLE OF CONTENTS

	Page
I. GENERAL INFORMATION	3
A. Instructions on Proposal Submission	
1. Proposal Submittal	3
2. Inquires	3
3. Conditions of Proposal.	3
4. Submission Instructions	3
5. Small and Disadvantaged Businesses	3
6. Right to Reject	3
7. Protest Rights	4
8. Conflict of Interest/Nepotism.	4
9. Notification of Award.	4
B. Description of Entity	4
II. SCOPE OF SERVICES.	4
III. STATEMENT OF QUALIFICATIONS, CONTENT & EVALUATION CRITERIA	
A. Proposal Content	5
B. Evaluation Criteria	5
IV. SOFTWARE COMPANY SELECTION PROCESS	6

I. GENERAL INFORMATION.

Purpose. This request for proposals (RFP) is to contract a client services tracking software to be provided to Rolling Plains Management Corporation (RPMC). Services needed include a comprehensive reporting structure with adaptable queries, straightforward and practical software for client tracking, data entry, and new program setups.

A. Instructions on Proposal Submission.

1. **Proposal Submittal.** Respondents should submit their RFP response proposals by 5:00 pm on **October 22, 2021**. Late proposal submittals will not be accepted. Proposals should not exceed a total of 20 pages, excluding a one-page cover letter, company brochure and **personnel resumes**. Minimum font size for all text is 11 point. Questions about the RFP must be submitted via e-mail to Marsha Anderson on or before October 15, 2021. A Response Addendum listing all questions received and RPMC's responses will be posted by October 19, 2021 on RPMC's website at: http://rollingplains.org/requests_for_proposals.php. It is the responsibility of each company to check the website if they are interested in the questions received and the responses provided by RPMC.
 2. **Inquiries.** Inquiries concerning this RFP should be e-mailed to:
Marsha.anderson@rollingplains.org
 3. **Conditions of Proposal.** Companies are solely responsible for all costs incurred in the preparation and submittal of the RFP.
 4. **Submission Instructions.** Your proposal should be submitted via e-mail to:
marsha.anderson@rollingplains.org
Subject line: "Client Services Tracking Software."
- It is the responsibility of the proposing company to ensure that the proposal is received by RPMC, by the date and time specified above.
5. **Small Disadvantaged Businesses.** 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 from through a state Uniform Certification Program or under the Small Business Administration 8(a) Business Development Program.
 6. **Right to Reject.** RPMC reserves the right to reject any and all proposals received in response to this RFP.
 7. **Protest Rights.** All protest or complaints regarding this proposal process shall be referred to the RPMC Executive Committee for resolution.

8. **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 with regard to 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.

9. **Notification of Award.** It is expected that a decision selecting the successful company will be made within four (4) weeks of the closing date for the receipt of proposals.

- B. **Description of Entity.** RPMC is a Community Action Agency that provides services to low income person in the north central Texas. RPMC currently has approximately 215 full and part time employees working from various sites throughout its service area. All executive, accounting, HR and IT staff are located in the Central office in Crowell, Texas. Other staff work out of program service offices in Wichita Falls and Abilene or one of the twelve (12) child development or transportation sites located across the service area.

II. SCOPE OF SERVICES. The basic services to be provided will include a client tracking software that allows for adaptable queried reporting and a straightforward software for data entry, client tracking, and new program setup. Software must be available for up to 30 users and must be available for all program services within the scope of RPMC including not limited to the following:

- 1) LIHEAP
- 2) Weatherization
- 3) CSBG
- 4) TVC
- 5) TBRA
- 6) LIHWAP

Company must demonstrate a quick response time for addressing any software issues or updates needed by Rolling Plains' key personnel as determined necessary.

The company shall provide the following:

A. Client Tracking:

- 1) Company must provide a software that is able to track clients and client's services for both current and previous program years.

- 2) Company must conduct a comprehensive training program for Community Services staff to ensure that the staff can explain and administer the new software in the future. The training program should be clearly spelled out in the proposal.
- B. **Reporting:** Software must include a comprehensive reporting structure with an adjustable query in order to provide accurate and detailed reporting that can be easily exported. Reports must include but are not limited to the following:
- 1) Unduplicated and duplicated reports
 - 2) Enrollment and intake reports
 - 3) Needs assessment reports
 - 4) Fund expenditure reports
 - 5) Payment pledges reports
 - 6) Performance reports

III. STATEMENT OF QUALIFICATIONS, CONTENT & EVALUATION CRITERIA

- A. **Proposal Content.** Proposals should demonstrate that the company has the professional capability and availability to satisfactorily and timely complete all the tasks as described in the Scope of Services section of this RFP. Responses should include:
- 1) The company's legal name, address, telephone number and principal contact e-mail address;
 - 2) The principal(s) of the company and their experience and qualifications;
 - 3) The experience, qualifications and assigned roles of any and all staff to be assigned to the project;
 - 4) A description of the company's prior experience, including design and construction management of any similar software programs, location of program, and total software program cost;
 - 5) A description of the company's current work activities and how these will be coordinated with the software services provided.
 - 6) The proposed work plan and schedule for activities to be performed; and
 - 7) a minimum of three references that are knowledgeable regarding the company's recent performance, including the company name, location where services were provided, contact person(s), contact telephone number, contact e-mail address, and a complete description of services provided, including dates of service. These references may be contacted to verify a company's ability to perform the contract. RPMC reserves the right to use any information or additional references deemed necessary to establish the ability of the company to perform the contract. (Negative references may be grounds for proposal disqualification).
- B. **Evaluation Criteria:** Respondents will be evaluated and scored according to the following factors: (100 pts)
- 1) **Pricing:** (50 pts)
 - a. Cost of software services outlines in this proposal. (25 pts)
 - b. Cost of any additional services for software use within the scope of the company's abilities. (12.5 pts)
 - c. Cost of any additional software users beyond what is requested in this proposal. (12.5 pts)

2) Overall quality of the Statement of Qualifications: (38 Points)

- a. Accessibility to data (10 pts)
- b. Ease of software use (10 pts)
 - i. Data entry (5 pts)
 - ii. New program setup (5 pts)
- c. Reporting scope: (18 pts)
 - i. Adjustable queries (9 pts)
 - ii. Availability of all client service programs as outlines by RPMC (9 pts)

3) The qualifications and experience of the company and professional personnel to be assigned to the project, including reference checks. (12 pts)

These are the questions that will be asked when we contact the reference. One points (1 pt.) will be awarded per reference for each favorable answer (4 pts). No points will be awarded for references, which cannot be verified, or who indicate that the work performed or staff conduct was unsatisfactory. Listed below are the questions that will be asked of each reference and the point value attached to their response:

- a. Was the quality of work of this company or person satisfactory or poor?
 - i. If satisfactory, specify in what way.
 - ii. If not satisfactory, specify in what way.
- b. Has this company or person been timely in completing service request?
- c. Did the company or person adequately train and explain the software they provided?
- d. If the occasion arose, would you contract/subcontract with this company or person to do a job for you in the future?

IV. SOFTWARE COMPANY SELECTION PROCESS

Upon receipt of responses, selection committee members will evaluate all responsive proposals and assign scores based on the stated evaluation criteria provided. Highest ranking companies may be asked to attend an interview or RPMC may opt to open direct negotiations with the company that presents the most qualified, highest scoring proposal. Contract negotiations will commence with the highest-ranked company. The contract, which may be renewed annually, will be awarded upon reaching an appropriate price for this software. If an appropriate agreement cannot be reached with the highest-ranked company, the second-ranked company will be approached, and so on. Unsuccessful companies will be notified as soon as possible.

This solicitation is being offered in accordance with federal and state statutes governing procurement of professional services. Accordingly, RPMC reserves the right to negotiate an agreement based on fair and reasonable compensation for the scope of work and services proposed, as well as the right to reject any and all responses deemed unqualified, unsatisfactory or inappropriate.

RPMC reserves the right to increase the scope of work with the selected company as long as the increase or addition is within the company's ability. Payment and contract terms will be negotiated with the selected company.

In no event shall any official, officer, employee or agent of RPMC be in any way personally liable or responsible for any covenant or agreement herein contained whether expressed or implied, not for any statement, representation or warranty made therein or in any connection with the agreement.

While RPMC has every intention to award a contract resulting from this RFP, issuance of the RFP in no way constitutes a commitment by RPMC to award and execute a contract. Upon a determination such actions would be in its best interest, RPMC, in its sole discretion, reserves the right to:

- Cancel or terminate this RFP;
- Reject any or all proposals received in response to this RFP;
 - Not award a contract, if it is in RPMC's best interest not to proceed with contract execution; or
 - If awarded, terminate any contract if RPMC determines adequate funds are not available.

Rolling Plains Management Corporation is an equal opportunity employer and provider.