



**Request for Proposals for
Client Services Tracking Software**

**Proposals accepted until:
Friday, July 26, 2024**

**Rolling Plains Management
Corporation 807 8th Street,
Suite 300
Wichita Falls, Texas 76301
940-723-2261**

marsha.anderson@rollingplains.org

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

TABLE OF CONTENTS

- I. Introduction**
- II. General Information**
 - i. Purpose**
 - ii. Contract Type**
 - iii. Timeline**
 - iv. Limitations and Reservations**
 - v. Modifications and Renewals**
 - vi. Signatures**
- III. Scope of Work**
- IV. RFP Timetable**
- V. Submission Guidelines**
- VI. Evaluation Criteria Table**
- VII. RFP Submission Checklist**
- VIII. Required Elements in Response Format**
- IX. Certification of Compliance with Required Elements**
- X. Assurances**
- XI. Additional Information and Certifications**
 - i. Certifications**
 - ii. Protest Rights**
 - iii. Standards of Conduct**
 - iv. Geographic Preference**
 - v. Subcontracting**
 - vi. Conflict of Interest/Nepotism**
 - vii. Federal/State/Local Compliance**

I. INTRODUCTION

Rolling Plains Management Corporation of Baylor, Cottle, Foard, Hardeman, and Wilbarger Counties (RPMC) was formed in 1965 to provide services to low-income individuals as the Economic Opportunities Advancement Corporation of Cottle, Foard, Hardeman, and Wilbarger Counties through a volunteer parent support group. During the 58 years that RPMC has served north Texas, RPMC has expanded its programs and services to support individuals and families from birth through senior years by providing transportation, utility assistance, weatherization, childcare assistance, and self-sufficiency services. The agency's service area has grown from four to twenty-eight counties with service availability varying by county. RPMC's Community Services department provides financial and case management services to economically eligible individuals and families in fourteen counties of north Texas.

II. GENERAL INFORMATION

i. Purpose

The purpose in soliciting Request for Proposals (RFP) is to contract a client services tracking software for Rolling Plains Management Corporation's (RPMC) Community Services Department to enhance the department's ability to administer federal, state, and local programs including the Community Services Block Grant (CSBG) and Comprehensive Energy Assistance Program (CEAP) administered through the Texas Department of Housing and Community Affairs (TDHCA).

ii. Contract Type

The winning proposal will be offered a standard firm fixed price three-year contract from **2024** to **2027** with Rolling Plains Management Corporation (RPMC) for the services specified in this proposal. At the option of RPMC, the contract period may be extended and renewed contingent upon funding.

iii. Timeline

The successful proposer agrees to begin providing services **no later than October 1, 2024** or an agreed upon date 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. Proposals which are incomplete, unsigned, or include errors may be deemed ineligible. 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 the RFP, PRMC 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. 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

A proposal shall be signed by the business's official authorized to bind that business 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.

III. SCOPE OF WORK

The Scope of Services describes the elements of a cloud-based client tracking software that would aid RPMC in our mission of providing quality emergency financial and case management services in an efficient and economical manner. 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 Community Service 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.

IV.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 Marsha Anderson at marsha.anderson@rollingplains.org by 5:00 pm (CST) on July 26, 2024

Action	Dates
Public Media Notice of RFP.....	Monday, July 8, 2024
Deadline for Question Submission.....	Wednesday, July 17, 2024
Final Addendum of Q&A Posted.....	Friday, July 19, 2024
Deadline for Receipt of Proposal.....	Friday, July 26, 2024
Contract Award.....	Friday, August 9, 2024

V. 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 Marsha Anderson at marsha.anderson@rollingplains.org is 5:00 pm (CST) on Friday, July 26, 2024. No hard copies will be accepted at this time.

All questions concerning this RFP packet should be directed by email to Marsha Anderson at marsha.anderson@rollingplains.org. Any questions submitted will be posted or communicated back to bidders via RPMC website [reference RFP Timeline for exact dates].

VI. 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
Price Structure	35
Software Features & Capabilities	30
Support and Maintenance	10
Implementation & Timeframe	10
Experience & References	10
Certified as a DBE, HUB, or SBE through a state Uniform Certification Program	5
Total Points	100

VII. RFP SUBMISSION CHECKLIST

- Required Elements in Response Format [Reference Heading VIII].
- Certification of Compliance with Required Elements [Reference Heading IX].
- Assurances [Reference Heading X].
- Certifications regarding Lobbying, Debarment, Suspension and Other Responsibility Matters; Including Drug-free Workplace Requirements and Americans with Disabilities Act [Reference Heading XI].
- Email proposals to Marsha Anderson at marsha.anderson@rollingplains.org by 5:00PM (CST) on Friday, July 26, 2024 [Reference Heading IV].

VIII. REQUIRED ELEMENTS 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 person shall sign the letter.
- Provide a turn-key solution which consists of cloud-based software for client tracking and services management including centralized intake, unduplicated client count, updated and flexible poverty guidelines, program eligibility calculator, priority point matrix, benefit amount calculation, real-time status tracking, automated payment creation, integrated custom workflows, pre-configured forms/assessments and surveys, customizable service and funding option, unlimited case notes and data storage, pre-configured and adhoc reports, and contact, service, and referral tracking. 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 provide their approach to providing the services.
 - System should be cloud based.
 - Proposer should also include options and capabilities not listed in this RFP, if any.
- Provide any type of necessary software (or hardware) integration required to provide a seamless solution. Detail the following points:
 - The proposer shall describe the approach to meeting the training, implementation, documentation, and transition requirements.
 - The implementation 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, 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 or through online training

modules 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.
- 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 system 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.
 - Proposer shall submit business continuity procedures and a disaster recovery plan which includes at a minimum recommended hardware and software and a documented disaster recovery plan.
 - Proposer shall provide a plan and procedure for RPMC to maintain access to client records for a minimum of three years following termination of contract.
- Support thirty (30) or more users and provide the ability to increase scope with additional users and functionality. System must be adaptable to various types of case management and financial assistance services.

- Work closely with RPMC Community Services Team to develop a Project Plan and provide any required documentation including Test/Acceptance Plan, Transition Plan, and Implementation 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 Client Tracking Software, integration and maintenance for advanced software systems for a minimum of 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.

- Indicate the number of years of experience operating such services in a stable, sound manner, as well as, three (3) references that include names, addresses and phone number of references familiar with the proposer's ability, experience, and reliability in the performance and management of projects of a similar nature.

- Provide price quotes for software, hardware, training, licensing (initial and annual), and maintenance and support. Detail the following points:
 - Proposer shall list additional options/capabilities of the system as applicable as well as all recurring costs including software and hardware updates, as applicable, and initial set-up fees and warranties.
 - Proposer shall describe cost related to software upgrades based on preferences of agency or changes as needed to meet funding requirements from TDHCA or other entities.
 - Proposer should provide three (3) and five (5) year price quote options for upfront payment of all reoccurring fees, licenses, and warranties.
 - Proposers may include pricing for multiple package options so that RPMC has the flexibility to build its own product package.

- Describe your organization's method and capacity to assure quality in the services requested through this RFP

IX. 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, HUB, and/or SBE 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)
- SBE Vendor (Small Business Vendor)
- Minority Owned Business
- None
- 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)

X. 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 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: _____

XI. 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.