

Southeast Texas Regional Planning Commission Beaumont, Texas

INVITATION FOR BID CLIENT TRACKING SOFTWARE

Proposals will be received by the South East Texas Regional Planning Commission (SETRPC) for Information Technology Support Services. Interested vendors should submit one original, 9 copies and one electronic copy (CD or flash drive) of their proposal response documentation in a sealed envelope marked as follows:

CSBG CLIENT TRACKING SOFTWARE

Please submit bids to:
Stephanie Robertson, Fiscal/Contract Manager
South East Texas Regional Planning Commission (SETRPC)
2210 Eastex Freeway
Beaumont, Texas 77703

Formal proposals must be **received** by **Friday, October 11, 2024, at 11:00 a.m.**
A public bid opening will be held on **Friday, October 11, 2024, at 1:00 p.m.** in the SETRPC Homer Nagel Room.

Vendors are required to provide as much detail as possible in this proposal, regarding scope of services, approach to protecting and securing the technology used by SETRPC users, and their capability and experience. SETRPC will utilize evaluation and selection criteria, based on SETRPC's standard proposal process, to determine an acceptable vendor. SETRPC reserves the right to reject any or all proposals or to accept any proposal considered most advantageous.

Proposals will be public information after bids are opened.
Please direct all inquiries to Stephanie Robertson at 409-899-8444 x6302 or srobertson@setrpc.org.

Description of Entity:

The South East Texas Regional Planning Commission (SETRPC) is a voluntary association of local governments serving 19 member cities and 21 special purpose districts in the Southeast Texas counties of Hardin, Jefferson and Orange. SETRPC is organized into 8 functional divisions: Administration, 9-1-1 Emergency Communications, Disaster Recovery, Experience Corps® Southeast Texas / Retired and Senior Volunteer Program, Homeland Security, South East Texas Foster Grandparent Program, Transportation & Environmental Resources, and the Community Services Division.

The SETRPC provides direct social services by way of its Community Services Division (CSD). The CSD carries out programs for the poor, persons with disabilities, the elderly, the homeless, at-risk youth and families seeking self-sufficiency. The SETRPC contracts with the Texas Department of Housing and Community Affairs (TDHCA) to provide CSBG social services.

The SETRPC contract with TDHCA for the Community Services Block Grant (CSBG) is intended to empower individuals, families and communities to overcome the effects of poverty and to support their progress toward greater self-sufficiency. Born from the War on Poverty, the CSBG program reduces dependence on other federal safety net services and increases the number of citizens contributing to the economy by focusing on the most vulnerable populations.

1. Purpose:

The purpose of this bid solicitation is to obtain client tracking software to effectively and efficiently manage the required data collection and reporting of client outcomes and financial assistance for services provided through the Community Services Block Grant (CSBG).

2. Submission Requirements:

Responses to the Bid Solicitation must contain the following information:

I. The software must allow SETRPC to collect client data to meet eligibility and reporting requirements according to the Texas Department of Housing and Community Affairs rules. Vendors must update software based on all federal and state regulation changes in a timely manner.

II. Software specifications:

- A. Internet Based
- B. Licenses Available for up to 4 Users
- C. Reporting System to meet TDHCA requirements for CSBG.
- D. Technical Support and Upgrades included.
- E. Case Management section to include case notes.
- F. National Performance Indicator (NPI) collection and reports.
- G. Client Kiosk entry accessibility.
- H. Ability to print reports by component or collectively.
- I. Ability to create customized client survey

III. Pricing

A. Software Cost: _____

B. Licensing Fees: _____

C. Annual Maintenance Cost: 1st Year _____

2nd Year _____

3rd Year _____

4th Year _____

5th Year & beyond _____

D. Other: Specify _____

E. Discounts: _____

F. Value added modules costs: _____

Budget Allocation management

Financial Module-compatible with MIP Software

Calendar Manager

Client Kiosk Accessibility

Client Survey Creation

Forms Designer _____

Total Costs: _____

*******All bid packets must include detailed marketing collateral.**

Any equipment specifications necessary to properly install, operate and maintain the software needs to be included in the proposal.

3. Rejection of Bids:

SETRPC reserves the right to reject any or all submissions, in whole or in part, for any reason without incurring any costs or liability whatsoever. All bids will be reviewed for completeness of the submission requirement. If a bid fails to meet a material requirement in the bid solicitation it will be considered incomplete.

All bids may be rejected in any case where it is determined that the bids are not competitive or where the cost is not reasonable.

Bids that contain false or misleading statements may be rejected if in SETRPC's opinion the information was intended to mislead SETRPC regarding a bid requirement.

SETRPC reserves the right to select the proposal that is most advantageous to the Agency.

*** 4. Proposal Instructions:**

One original, nine copies and one electronic copy (CD or flash drive) of the bid must be submitted no later than 11:00 a.m. on Friday, October 11, 2024. Proposals received after that date/time will not be considered. It is the responsibility of the bidder to ensure that the proposal is received by SETRPC by the deadline. Sealed bids should be mailed or delivered to: SETRPC Attn: Stephanie Robertson, Contract Manager, 2210 Eastex Freeway, Beaumont, Texas 77703. Bids may not be emailed or faxed. All bids must be submitted in a sealed envelope clearly marked on the outside:

**CSBG CLIENT TRACKING SOFTWARE
SEALED BID, DO NOT OPEN**

All costs incurred in the preparation of the proposal responding to this bid will be the responsibility of the bidder and will not be reimbursed by SETRPC.

5. Evaluation and Review of Proposals:

Sealed bids will be publicly opened at the SETRPC Administration Office located at 2210 Eastex Freeway, Beaumont, Texas at 1:00 p.m. on Friday, October 11, 2024.

All proposals will be evaluated based on a point system by the CSBG Advisory Council. The CSBG Advisory Council will recommend a contract to the SETRPC Executive Board for a final decision. SETRPC will not discriminate regarding race, color, creed, sex, religion, national origin, disability, marital status, parenthood or age.

The following criteria will be used for evaluating each proposal:

- Overall product quality.
- Suitability of the software to meet required data collection and reporting needs of the Agency and its mission.
- Cost
- Customer service and support (References, Retention, Measured services rates)

| Factors | Points |
|--|---------------|
| Submission requirements met | 0-5 |
| Prior experience working with non-profits | 0-5 |
| Knowledge of federally funded utility assistance programs, weatherization assistance programs, national performance indicators and transitioning out of poverty. | 0-5 |
| Results of references – Integrity and resources | 0-10 |
| Minority/Small Business | 0-10 |
| Support System | 0-5 |
| Cost of Annual Maintenance | 0-10 |
| Discounts | 0-5 |
| Price | 0-45 |
| Maximum Points | 100 |

6. Notification of award:

Upon conclusion of final negotiations with the successful bidder, all bidders submitting proposals in response to this Bid Solicitation will be informed in writing of the name and the successful bidder.

7. Protest Procedure:

All protests regarding the solicitation process must be submitted in writing to the Community Services Division Director within (5) five business days following the receipt of the notification letter. Failure to protest within the time frame will constitute a waiver of protest.

8. Questions:

Inquiries concerning this Bid Solicitation should be directed to Stephanie Robertson in writing at srobertson@setrpc.org. Deadline for questions is October 7, 2024, at 1:00 p.m.

SPECIFICATIONS

Section 1.0 – Executive Summary

This part of the response to the IFB should be limited to a brief narrative highlighting the bidder's proposal. The summary should contain as little technical jargon as possible, should be oriented toward non-technical personnel and be no more than 2 pages.

The complete name of the firm or person(s) submitting the proposal, the main office address, and the primary and secondary contact person(s) and their respective telephone numbers and email addresses should be included in this section.

Section 2.0 – Vendor Background and Qualifications

Provide narrative responses to the following questions, including any necessary documentation, for each item listed below.

1. Specify the number of years the Vendor has been in the non-profit sector software business.
2. Provide information on product implementations and success of data transfer of prior software products.
3. Provide a brief statement of the company's background demonstrating longevity and financial stability.
4. Describe the seniority, tenure and background of the senior management team.
5. Describe your customer support procedures and the typical interaction that can be expected on a customer support call.
6. What metrics do you use to evaluate the quality of customer service and response time on support calls?
7. Describe the company's commitment to research and development for the IFB application being proposed.

Section 3.0 – Customer References

Please provide at least five (5) customer references that are representative of the requested system.

Section 4.0 – Response to Software Requirements

1. Describe how the proposed software meets the Functional Requirements provided in General Requirements and what, if any, alternate or optional requirements are met.
2. Describe how the reporting system works and what tools are included for creating custom reports.
3. Describe the administration of application security. Include how it is configured, how groups or roles are used, and what actions can or cannot be taken for various settings, etc.
4. Describe how your solution creates an "audit trail" when data is changed. Include the types of data for which a trail is created, and what is recorded (user id, date, etc.) when the data is changed.

Other:

- Is Firm a certified HUB: _____
- Is the Firm on the state or federal Debarment/exclusion list? _____
- Does Firm have any relationships that would be considered a conflict of interest involving any SETRPC Board member, employee or vendor? _____
 - If yes, attach a list describing the relationship as **“Attachment A”**
 - If not signed, form indicates no conflict of interest exists.
- Please include any copies of State licenses that might be necessary for the completion of the scope of work [i.e. electrical license]
- Has Firm had any prior experience working with non-profit agencies? _____
- If yes, attach list of Non-Profit agencies with contact person and phone numbers as **“Attachment B”**
- How many years has firm worked with non-profit agencies? _____
- How many non-profit agencies has firm worked with in the past 5 years? _____

References:

Company Name: _____
Contact Person: _____
Address: _____
Phone #: _____

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Address: _____
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Certification

I hereby certify that the information provided above is true and correct. I hereby certify that prices quoted above are true and correct and shall remain in effect for the contract period of one year and may be extended for up to (4) four additional years. I understand that SETRPC is a non-profit agency and is exempt from state and local taxes and has therefore not included taxes in the pricing provided above.

Authorized Agent

Date

Scoring Form (Scoring will be on a competitive basis.)

Company/Firm Name: _____

| Factors | Response | Possible Points | Points Received |
|---|-----------------|------------------------|------------------------|
| Complete Packet | | 0-5 | |
| Prior Non-Profit Experience | | 0-5 | |
| Knowledge of federally funded utility assistance programs, weatherization assistance programs, national performance indicators and transitioning out of poverty | | 0-5 | |
| References | | 0-10 | |
| Minority owned | | 0-10 | |
| Support System | | 0-5 | |
| Cost of Annual Maintenance | | 0-10 | |
| Discounts | | 0-5 | |
| Price | | 0-45 | |
| TOTAL | | 100 | |

Total Points: _____

Rank of Bidder: _____

Attachment A

Does your firm have any conflict of interest involving a SETRPC Board member, employee or vendor?
Please describe:

If none please sign here: _____

Attachment B

Specific experience with Non-profit Agencies:

Calendar of IFB Activities

| | |
|---|--|
| IFB Ads | September 19, 2024 and September 26, 2024 |
| Proposer's Packet Available on www.setrpc.org | September 16, 2024 |
| Proposer's Questions Due | October 7, 2024 - 1:00 p.m. |
| SETRPC Email Responses to Proposer's Questions Due | October 7, 2024 - 2:00 p.m. |
| Proposer Presentations | October 7, 2024 - 3:00 p.m. |
| Deadline for Proposals | October 11, 2024 - 11:00 a.m. |
| Bid Opening | October 11, 2024 – 1:00 p.m. |
| Notification of Awards | October 15, 2024 |
| Anticipated Contract Start Date | November 1, 2024 |

***Revised 9/20/24: #4 One original and one electronic copy (flash drive) of the bid must be submitted no later than 11:00 a.m. on Friday, October 11, 2024.** Proposals received after that date/time will not be considered. It is the responsibility of the bidder to ensure that the proposal is received by SETRPC by the deadline. Sealed bids should be mailed or delivered to: SETRPC Attn: Stephanie Robertson, Contract Manager, 2210 Eastex Freeway, Beaumont, Texas 77703. Bids may not be emailed or faxed. All bids must be submitted in a sealed envelope clearly marked on the outside:

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