



Vendor Name:

TARRANT COUNTY
PURCHASING DEPARTMENT

JACK BEACHAM, C.P.M., A.P.P.
PURCHASING AGENT

ROB COX, C.P.M., A.P.P.
ASSISTANT

RFP NO. 2012-123

**REQUEST FOR PROPOSALS
FOR
CONSTITUENT MANAGEMENT SYSTEM**

**PROPOSALS DUE AUGUST 15, 2012
2:00 P.M.**

RFP NO. 2012-123

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This Table of Contents is intended as an aid to vendors and not as a comprehensive listing of the proposal package. Vendors are responsible for reading the entire proposal package and complying with all specifications.

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

PRE-PROPOSAL CONFERENCE

All bidders are encouraged to attend a Pre-Proposal Conference to be held:

DATE: THURSDAY, AUGUST 2, 2012
TIME: 10:00 A.M.
LOCATION: TARRANT COUNTY ADMINISTRATION BUILDING
PURCHASING DEPARTMENT CONFERENCE ROOM
100 E. WEATHERFORD, SUITE 303
FORT WORTH, TX 76102

PERSONS WITH DISABILITIES REQUIRING SPECIAL ACCOMMODATIONS SHOULD CONTACT RALPH McBROOM AT 817-212-7233, AT LEAST TWO (2) DAYS PRIOR TO THE PRE-PROPOSAL CONFERENCE.

RSVP: Vendors planning to attend the pre-proposal conference should RSVP, in writing, via facsimile, no later than 5:00 p.m., Wednesday, August 1, 2012

Send RSVP'S to Ralph McBroom, at (817) 884-2629.

Questions from vendors will be addressed at the pre-proposal conference. Any vendor who submits a proposal without attending the scheduled pre-proposal conference does so at his own risk. Such applicant who submits a proposal and does not attend the scheduled pre-proposal conference waives any right to assert claims due to undiscovered conditions.

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

Tarrant County is soliciting proposals for a **CONSTITUENT MANAGEMENT SYSTEM** .

THE ORIGINAL AND FOUR (4) COPIES
OF
COMPLETED PROPOSALS
MUST BE RECEIVED IN THE
PURCHASING DEPARTMENT
AT 100 E. WEATHERFORD, SUITE 303
FORT WORTH, TEXAS 76102
ON OR BEFORE AUGUST 15, 2012 AT 2:00 P.M.

All proposals, including a "NO BID", are due in the Purchasing Department by the due date, in sealed envelopes or boxes. **All proposals must be clearly marked with the RFP Number, the name of the company submitting the proposal, and date and time of opening on the outside of the envelope/box and/or Air Bill/Delivery Receipt.** Original proposal must be clearly marked "ORIGINAL" and contain all original signatures.

Any proposal received after the date and/or hour set for RFP opening will not be accepted. Respondent will be notified and will advise Tarrant County Purchasing as to the disposition by either pick up, return at respondent's expense, or destroyed with written authorization of the bidder. If proposals are sent by mail to the Purchasing Department, the respondent shall be responsible for actual delivery of the proposal to the Purchasing Department before the advertised date and hour for opening of RFPs. If mail is delayed either in the postal service or in the internal mail system of Tarrant County beyond the date and hour set for the RFP opening, proposals thus delayed will not be considered and will be disposed of as authorized.

Proposals may be withdrawn at any time prior to the official opening. Alterations made before opening time must be initialed by proposer/respondent guaranteeing authenticity. After the official opening, proposals become the property of Tarrant County and may not be amended, altered or withdrawn without the recommendations of the Purchasing Agent and the approval of Commissioners Court.

Tarrant County is exempt from Federal Excise and State Sales Tax. The County is not exempt from Surplus Lines Tax or Texas Stamping Tax. Therefore, only applicable taxes must be included in this proposal.

No oral explanation in regard to the meaning of the proposal specifications will be made and no oral instructions will be given before the award of the contract. Requests from interested respondents for additional information or interpretation of the information included in the specifications and all questions should be directed in writing, via facsimile, to:

**RALPH MCBROOM C.P.M., CONTRACTS ADMINISTRATOR
FAX: (817) 884-2629**

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All documents associated with this RFP including but not limited to, the RFP document, questions and their responses, addenda and special notices will be posted under the RFP number on the Tarrant County website and available for download by respondents and other interested parties. No documents will be faxed or e-mailed after the initial Notice of Intent and prior to RFP award. It is the bidders'/respondents' sole responsibility to review this site and retrieve all related documents prior to the RFP due date.

The deadline for receipt of all written questions shall be 12:00 (Noon), Fort Worth time, Friday, August 3, 2012.

Proposal Response Forms must be fully completed and included in your response. Forms that have been retyped or altered may result in rejection of proposal.

It is the respondent's sole responsibility to print and review all pages of the RFP document, attachments, questions and their responses, addenda and special notices. The Proposal Signature Form must be signed and returned. Failure to provide signature on this form renders proposal non-responsive. Failure to complete and submit all required forms, including but not limited to the Reference Page, Certificate of Eligibility, Checklist, Questionnaires (when applicable), Addenda (including revised forms), and any other specified forms or documents will be grounds for rejection of entire proposal.

CONFIDENTIALITY: Any material that is to be considered confidential in nature must be clearly marked as such and shall be treated as confidential to the extent allowable in the Open Records Act. Pricing information is not considered confidential. Trade secrets or confidential information **MUST** be placed in a separate envelope marked "**CONFIDENTIAL INFORMATION**" and **EACH PAGE** must be marked "**CONFIDENTIAL INFORMATION.**" Tarrant County will make every effort to protect these papers from public disclosure as outlined in LGC, Section 262.030(c) of the State of Texas County Purchasing Act.

"The Texas Public Information Act gives the public the right to request access to government information, subject to certain narrow exceptions. Tarrant County is an entity subject to this Act. Therefore, please be advised that your company's declaration that certain information submitted in response to an RFP is "confidential" will not be treated as such if the County receives a request for a copy of the RFP. The County will of course make every effort to inform your company of such a request and to provide you with an opportunity to object to the release of any proprietary information, but Tarrant County cannot and will not make an agreement to withhold information from the public contrary to the County's responsibilities under the Act."

Additionally, to the extent your response is incorporated into the contract, that contract will become an official record available for public inspection.

Proposals shall be opened so as to avoid disclosure of contents to competing offerors and kept secret during the process of negotiation. All proposals that have been submitted shall be open for public inspection after the contract is awarded, except for trade secrets and confidential information contained in the proposals and identified as such.

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The successful Contractor shall defend, indemnify, and hold harmless Tarrant County from any and all liability or loss of any nature whatsoever arising out of or relating to the Contractor performing work on County premises, including, without limiting the generality of the foregoing coverage, any act or omission of the contractor, its agents, servants, employees, or invitees in the execution or performance of the contract.

Continuing non-performance of the vendor in terms of Specifications shall be a basis for the termination of the contract by the County. The County shall not pay for work, equipment, or supplies which are unsatisfactory. Vendors will be given a reasonable opportunity before termination to correct the deficiencies. This, however, shall in no way be construed as negating the basis for termination for non-performance.

The **contract may be terminated** by either party upon written thirty (30) days notice prior to cancellation.

Proposals will be considered irregular if they show any omissions, alteration of form, additions or conditions not called for, or irregularities of any kind. However, Tarrant County reserves the right to waive any irregularities and to make award in the best interest of the County.

Tarrant County reserves the right to accept or reject in part or in whole any proposals submitted and to waive any technicalities for the best interest of the County. Proposals may be rejected, among other reasons, for any of the following specific reasons:

1. Proposals received after the time limit for receiving proposals.
2. Proposals containing any irregularities.
3. Unbalanced value of any items.

Vendors may be disqualified and their proposals not considered, among other reasons, for any of the following specific reasons:

1. Reason for believing collusion exists among the Vendors.
2. Reasonable grounds for believing that any Vendor is interested in more than one Bid for the work contemplated.
3. The Vendor being interested in any litigation against the County.
4. The Vendor being in arrears on any existing contract or having defaulted on a previous contract.
5. Lack of competency as revealed by a financial statement, experience and equipment, questionnaires, etc.
6. Uncompleted work which in the judgement of the County will prevent or hinder the prompt completion of additional work, if awarded.
7. Respondents shall not owe delinquent property tax in Tarrant County.

Due care and diligence has been used in preparation of this information, and it is believed to be substantially correct. However, the responsibility for determining the full extent of the exposure and the verification of all information presented herein, shall rest solely with the proposer. Tarrant County and its representatives will not be responsible for any errors or omissions in these specifications, nor for the failure on the part of the proposer to determine the full extent of the exposures.

The successful proposer/respondent may not assign their rights and duties under an award without the written consent of the Purchasing Agent. Such consent shall not relieve the assignor of liability in the event of default by the assignee.

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SPECIAL TERMS AND CONDITIONS OF THE CONTRACT

I. MINIMUM INSURANCE REQUIREMENTS

- A. The Respondent shall take out, pay for and maintain at all times during the prosecution of the work under the contract, the following forms of insurance, in carriers acceptable to and approved by Tarrant County.
1. Workers' Compensation/Employer's Liability
 - a. Worker's Compensation — statutory
 - b. Employer's Liability — \$500,000
 2. Comprehensive Commercial General Liability:
 - a. Bodily Injury/Personal Injury — \$1,000,000 per occurrence
\$2,000,000 aggregate
 - b. Property Damage — \$1,000,000 aggregate
 3. Professional Liability/Errors and Omissions — \$1,000,000
- B. The County reserves the right to review the insurance requirements of this section during the effective period of the contract and to require adjustment of insurance coverage and their limits when deemed necessary and prudent by the County based upon changes in statutory law, court decisions, or the claims history of the industry as well as the Respondent.
- C. Required Provisions:
1. Proof of Carriage of Insurance - All certificates of insurance will be required in duplicate and filed with the Purchasing Agent and the Budget and Risk Management Department at 100 East Weatherford Street.
 2. All certificates shall provide Tarrant County will receive an unconditional thirty days written notice in case of cancellation or any major change.
 3. As to all applicable coverage, certificates shall name Tarrant County and its officers, employees, and elected representatives as an additional insured.
 4. All copies of the certificates of insurance shall reference the project name and bid number for which the insurance is being supplied.
 5. The Respondent agrees to waive subrogation against Tarrant County, its officers, employees, and elected representatives for injuries, including death, property damage, or any other loss to the extent the loss, if any, is covered by the proceeds of insurance.
 6. The Respondent is responsible for making sure any sub-contractor(s) performing work under this agreement has the required insurance coverage(s) and supplies Tarrant County with the proper documents verifying the coverage.

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SPECIFICATIONS/SCOPE OF WORK

I. BACKGROUND

- A. The offices of the Tarrant County Commissioners serve as liaisons between the public and Tarrant County, as well as the surrounding communities and service providers. In addition to work in community outreach efforts, the offices receive a high volume of calls, emails, and walk-ins daily related to issues regarding areas such as road maintenance, contacts, communications and project management. There is a business need for a Constituent Management System to:
 - 1. Track issues, requests, tasks, and projects;
 - 2. Enable multiple users to share information; and
 - 3. Provide reporting capabilities.
- B. Tarrant County is looking for either a conventional Constituent Management System installed at Tarrant County or a hosted Constituent Management System (Off Site) that would provide the same or very similar functionality.
- C. Tarrant County has approximately two (2) million residents.

II. CURRENT BUSINESS PROCESS

- A. Calls, emails, requests, issues, projects and related information are tracked and recorded manually using a variety of software and equipment: Outlook, Access, Excel, Word, phone, postal service, copier, printer, scanner, and physical filing system. Reporting is limited. These tools have limited capabilities for sharing information with other staff members and tracking information as questions lead to research, meetings, and multiple documents related to the original request(s).

III. TECHNICAL INFRASTRUCTURE

- A. The current network infrastructure utilizes 100 Mbps Ethernet over fiber lines for the transmission of data and communication with sub courthouses. The geographical configuration currently has Database Servers and Application Servers sited at the County IT Datacenter.
- B. The Tarrant County IT environment supports Microsoft Outlook, Visual Studio .NET, Microsoft Windows Server, Microsoft SQL Server, Microsoft .NET framework, and Active Directory. For data storage, the Tarrant County IT standard is Microsoft SQL Server databases. IT has an established protocol for Security and Authentication in a Microsoft environment. Well defined conventions are in place for Authentication, Active Directory and Trusted Certificates.

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IV. SYSTEM SECURITY

- A. The following are some anticipated user categories and descriptions which may serve as a guide for system security capabilities:

Group Description Probable Members

| Group | Description | Probable Members |
|----------------------|--|---|
| Administrator | Ultimate (administrative) authority over content for each department | Designated Administrator for each precinct |
| System Administrator | Technical maintenance of system | Tarrant County Core Competency Center Support Group |
| Users | Input information, run related reports | Staff members at Pct 1 and Pct 2 |

V. SYSTEM REQUIREMENTS

- A. Please mark each row to indicate if your system meets the listed requirement, and provide detailed information in an attachment as to how the proposed system meets, exceeds, or approaches the following requirements. **A response that follows the numbering system in this request is required.**

1. General Requirements: Overall System

| | | Yes | No |
|-----|--|-----|----|
| 101 | The system should provide workflow management. | | |
| 102 | The system should be able to incorporate and exchange data with Microsoft Word, Excel, Outlook, etc. | | |
| 103 | The System should allow for a test environment for the implementation phase as well as for any system updates. | | |
| 104 | The system should have extensive search capabilities. | | |
| 105 | The system should allow the ability to create ad-hoc (custom) reports (automatic template that users can modify and control). The reports should allow the results to be sorted and printed by various fields. | | |

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| | | Yes | No |
|-----|---|-----|----|
| 106 | The system should allow a supervisor/manager to be able to review/approve report data without having to print the report. | | |
| 107 | The system should integrate with the Microsoft Office suite and email integration to facilitate the internal workflow. | | |
| 108 | The system should operate in the latest version of Microsoft SQL Server. | | |
| 109 | The system should operate with Microsoft Office 2010 and Microsoft Office 2007. | | |
| 110 | The system should use the existing local and wide area networks. | | |
| 111 | The system should be able to support a server inside the Tarrant County firewall and application authentication for outside entities accomplished through ISA (Internet Security and Acceleration). | | |
| 112 | The system should provide case management, including tracking of and identifying case information, chain of custody documentation, and all associated supporting documentation. | | |
| 113 | The system should provide extensive administration, data mining, search, and statistical reporting functions, configurable by Tarrant County. | | |
| 114 | The system should allow a web-based portal. | | |
| 115 | The system should provide Administrators the ability to manage credentials for their own users. | | |
| 116 | The system should be configurable to automatically assign an issue based on the issue category. | | |
| 117 | The vendor will provide system documentation and user training manuals that reflect current business processes and discipline-specific end-user training. | | |
| 118 | The vendor will provide detailed software and hardware requirements to implement the System. | | |
| 119 | The system should be able to capture and report information on the time between case assignment and completion. | | |
| 120 | The system should allow assignment of priority to work assignments. | | |

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| | | Yes | No |
|-----|---|-----|----|
| 121 | The system should allow the assigned technician the ability to record completed activities against the work assignment. | | |
| 122 | The system should allow the technician to record notes into distinct work areas for specific disciplines. | | |
| 123 | The system should alert supervisors to new submission requests. | | |
| 124 | The system should alert designated personnel to open analysis requests with impending deadlines. | | |
| 125 | The system should allow for full-text searches of communications logs. | | |
| 126 | The system should allow the ability to attach external documents to cases – PDF's, Images, Docs, Excel spreadsheets, etc. | | |
| 127 | The system should have the ability to import data from an existing Microsoft SQL Database. | | |

Does your proposed solution meet or exceed all the requirements specified above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is required.

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2. Training:

| | | Yes | No |
|-----|--|-----|----|
| 201 | The Vendor should provide system specific training classes. The specific training classes should be for a minimum of the following categories of users: <ul style="list-style-type: none"> • System Administrators • Supervisors • Operational Support • End Users | | |
| 202 | The Vendor should provide an estimated timeframe for conducting training for this type of environment. | | |
| 203 | The Vendor should prepare and provide how-to-guides, quick reference cards, and other reference materials. | | |
| 204 | The system should provide on-line help screens. | | |
| 205 | The system should provide an on-line tutorial detailing business processing. | | |

Does your proposed solution meet or exceed all the requirements specified above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is required.

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3. User and System Software Licenses:

| | | Yes | No |
|-----|--|-----|----|
| 301 | The vendor should supply a detailed list of all software and related licensing to implement the system both at the system level and the desktop level. | | |
| 302 | As a requirement of the support and maintenance, the vendor should provide software updates at no additional cost. | | |
| 303 | The vendor should supply licensing terms and conditions. | | |

Does your proposed solution meet or exceed all the requirements specified above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is required.

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4. System Administration, Security, and Audit

| | | Yes | No |
|-----|--|-----|----|
| 401 | The system should provide screens and applications to be used by the system administrator to update and maintain the system data items such as user IDs and passwords. | | |
| 402 | The system should provide the capability to maintain lookup tables and selection list for data entry. Examples include Status, Categories, etc... | | |
| 403 | The system should provide the ability to modify and delete information by administrator. | | |
| 404 | The system should provide the capability to define and maintain user records, including staff name, user account, and password creation and reset. Also set an expiration date based on number of days. | | |
| 405 | The system should have a hierarchal security structure. This will allow a progressively narrower access to the functional areas starting with a broad access by the system administrator and narrowing to a much defined access by an end-user application. | | |
| 406 | The system should ensure proper user identification based on defined roles. Proposer should describe the application security structure. | | |
| 407 | The system should implement security measures that ensure that only appropriate application functionality should be provided to users with associated privileges. The privileges should be established by the designated System Administrators. | | |
| 408 | Whenever a database record is modified, the system should log the information that is being changed and by whom (date, time, and logged-on operator), prompt for a reason for change and from what application/function or program. This is referred to as an audit log. The ability to archive the audit log should be preserved and the system should have a feature for appropriate personnel to review the audit logs. | | |
| 409 | The audit trail should not be able to be deactivated by any user or administrator. | | |
| 410 | The system should provide the capability to output the audit log to the screen and/or printer. | | |

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| | | Yes | No |
|-----|--|-----|----|
| 411 | The system should have the capability of offering different levels of access, for example, Administrator, Supervisor, data entry, etc... | | |
| 412 | The system should be capable of supporting users/agencies from multiple jurisdictions and should allow for multi-role user access. | | |
| 413 | The system should have an account lock mechanism on failed logon attempts at a threshold set by the System Administrator. | | |
| 414 | The System Administrator should be able to set password expiration timeouts. | | |

Does your proposed solution meet or exceed all the requirements specified above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is required.

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5. Quality Assurance:

| | | Yes | No |
|-----|---|-----|----|
| 501 | If the vendor is presenting a Microsoft based solution, the vendor should be a Microsoft Gold Certified ISV with the ability to ensure the system has been fully tested and certified by Microsoft and VeriTest to substantiate quality and performance. Vendors presenting solutions other than Microsoft based solutions should have similar certifications on the solution platform presented. | | |
| 502 | The vendor should ensure that the system provides timely responses to inquiries. The vendor should provide a list of standard inquiries/transactions available through the proposed system with associated response times. | | |
| 503 | The system should support simultaneous users without significant degradation of the system performance as users are incrementally added. | | |

Does your proposed solution meet or exceed all the requirements specified above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is required.

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6. Test Strategy and Plan:

| | | Yes | No |
|-----|---|-----|----|
| 601 | The vendor should provide a test strategy and plan with the proposal. Tarrant County will work with the selected vendor to refine the testing plan. | | |
| 602 | The system should support a test environment that is separate from the production environment. | | |
| 603 | The test strategy should propose in detail the testing approach recommended by the vendor. | | |
| 604 | The test plan should detail all the system processes and have a comprehensive test script for each process. | | |
| 605 | The test plan should include a stress test to measure the performance of the system and to establish a baseline. | | |
| 606 | Tarrant County reserves the right to conduct its own test(s) independent of any testing performed by the vendor. | | |

Does your proposed solution meet or exceed all the requirements specified above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is required.

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7. Inspection and Acceptance:

| | | Yes | No |
|-----|---|-----|----|
| 701 | The vendor should notify the Tarrant County Project Manager in writing when the System is ready for the Tarrant County business Unit test and accept. | | |
| 702 | Using the test plans described within the "Test Strategy and Plan" section above, Tarrant County will test the system. If Tarrant County identifies deficiencies in the system, the Tarrant County Project Manager will provide the Vendor with written notice of the deficiencies. The Vendor should correct the deficiencies at no additional charge, during a period acceptable to the Department. | | |
| 703 | If, in Tarrant County's sole opinion, deficiencies continue to exist in the System after the corrective action period, Tarrant County may terminate the contract or negotiate an equitable adjustment. | | |

Does your proposed solution meet or exceed all the requirements specified above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is required.

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8. Transition and Implementation:

| | | Yes | No |
|-----|--|-----|----|
| 801 | The vendor should provide a plan for transitioning from the current system to the proposed system production mode. The plan should include a time line for each step. | | |
| 802 | The vendor should provide a detailed implementation plan that describes how the system will be put into production. | | |
| 803 | The vendor should assume all operational and specified support responsibility for the life of contract from time of acceptance by Tarrant County until final Sign Off in Production by the Project Sponsors. | | |
| 804 | The vendor should provide support personnel on site to install the system and perform Functional and Performance Testing. | | |

Does your proposed solution meet or exceed all the requirements specified above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is required.

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9. System Support:

| | | Yes | No |
|-----|--|-----|----|
| 901 | The vendor should provide a help desk available, at a minimum, 8:00 am to 5:00 pm, Monday-Friday for the service provided. | | |
| 902 | The vendor should provide a 24hr/365day customer care portal to receive, track, and manage all customer service issues. | | |
| 903 | The vendor should provide customer and technical support with professionals available to answer questions, document comments/suggestions, and provide technical or administrative information regarding the system. | | |
| 904 | The vendor should submit a plan with the proposal detailing proposed levels of response based on problem severity, normal business vs. off-hours response time, and resolution time for all problems identified by Tarrant County. | | |
| 905 | The vendor should submit with the proposal a documentation of the average response time and resolution time for all system issues identified for current customers within the last 60 days . | | |
| 906 | Any service support contract should provide free bug fixes and product upgrades, as well a preventative maintenance. | | |
| 907 | The service support contract should provide discounted access to new product modules. | | |
| 908 | Annual maintenance and support costs will not be incurred by Tarrant County until Tarrant County has accepted the system and is operating live. This will be referred to as the Production Sign Off by the Project Sponsors. | | |

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Does your proposed solution meet or exceed all the requirements specified above?

Yes _____ No _____

If yes, provide detailed information as to how your system meets or exceeds the proposed requirements. If no, list exceptions and include your recommendations or alternative solutions. If needed, additional pages may be included in responses. A response that follows the numbering system in this request is required.

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VI. Vendor Qualifications

A. General Requirements

1. Tarrant County is seeking an experienced provider of Constituent Management software for Commissioner's Offices. A Respondent is any individual, organization, or team eligible to respond to this RFP. A Respondent's response will be called a Proposal. A firm responding to this RFP will be referred to as a Respondent. A Respondent selected to provide the services described in this RFP will be referred to as the Contractor.
2. The responses will be evaluated in accordance with predetermined criteria, with clarifications and best and final offers, as the County deems necessary. All Respondents are advised to begin preparation of their responses immediately, as the requirements of this RFP are complex and must be responded to carefully.
3. The Respondent must demonstrate to the sole satisfaction of the County that the proposed solution can successfully deliver services of the type and scope set forth in this RFP. The Respondent should provide a resume for each proposed Project Team member that clearly demonstrates technical and subject matter expertise required by this RFP.

VII. Contract Requirements

- A. The Contract for the Constituent Management System will be deliverable-based using a **fixed fee** pricing model. If a Hosted solution is proposed, please see Section IX – Alternate Approaches.
- B. The terms and conditions of the Statement of Work and Contract will be fully negotiated.
- C. The vendor should conduct a weekly client review session and provide written status reports that indicate progress against deliverables.
- D. The financial proposal must include all costs as indicated in the Proposed Financial Response Form.
- E. Tarrant County expects the contract to begin in 4th quarter 2012.

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VIII. PROPOSAL SUBMISSIONS

Proposals should be submitted with the information placed in the following order and divided into sections:

A. Section 1 – Vendor’s Qualifications and Experience

1. Executive Summary - This section should be limited to a brief narrative highlighting company’s background and experience. Narrative should clearly demonstrate compliance with vendor qualifications listed in the RFP specifications. Include length of time the company has been in business and provide examples of past projects.
2. Company’s Financial Response – This section should contain information on a Vendor’s financial stability, capability and viability. Respondent must demonstrate financial stability and viability to the sole satisfaction of the County. This section shall include the following documentation:
 - a. A current Financial Statement that has been prepared no more than six months prior to the date of submission of the Proposal.
 - b. Two (2) most recent annual audits or independently reviewed financial statements, and the most recent quarterly statement.
 - c. For each key subcontractor proposed by Respondent, if any, furnish the most recent annual financial statement and the most recent quarterly statement.

B. Section 2 - Project Approach and Management

1. Project Solution – This section should contain a narrative that clearly demonstrates the Vendor’s approach toward meeting the goals and objectives of this RFP. This section should address how each specific requirement of the RFP will be met by the proposed solution. Further, any desirable features of this approach should also be explained. Clarity of description of the proposed solution is the aim and, therefore, use of product boilerplate and marketing releases throughout this section is discouraged.
2. Project Management – This section should contain a brief description of how the Vendor proposes to successfully manage this project. The Vendor should include a description of how the project team will be structured, its roles and responsibilities, location within the company’s organizational framework and chain of command. Brief two page resumes of the Vendor staff assigned to this project along with their assignment are to be included in this section. Since Vendor staff experience and knowledge are a vital component of project success, Tarrant County expects and requires that resumes submitted are for staff actually assigned to the project.

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

3. Technical Response – This section should set forth the proposed technical solution in response to this RFP. The Vendor must demonstrate to the sole satisfaction of Tarrant County that the Vendor can successfully deliver services of the type and scope set forth in this RFP. The Vendor should provide a preliminary Statement of Work that describes products to be delivered and the work to be performed by the Vendor during this engagement. Include responses to the Systems Requirements Checklist (located in Section V).
 4. Impact on Information Technology Departments - Performance of this project cannot be completed without consultation with the IT departments. At the very least, this will include Communications, Database, Security, Servers, Development Support, and Enterprise Support. An estimate should be provided of the time that will be required with each IT department
- C. Section 3 - References
1. Submit three (3) vendor references, other than Tarrant County, who can verify your performance as a vendor.
- D. Section 4 - Cost Proposal
1. Proposed Financial Response Form should be placed in a separate, sealed envelope and clearly marked with the respondent's name and RFP number. Sealed envelope with cost proposal should be included in envelope/box with proposals for shipping.
 2. The Cost Proposal must set forth all costs associated with the proposed response to this RFP. Any contract signed will be a fixed cost contract and no other costs will be allowed for performance of proposed solution.
 3. Include first year annual system maintenance fees, license fees and other costs and projected costs for five (5) years.
- E. Section 5 – Vendor Contract
1. Respondents are to include one (1) original of any or all vendor-required contracts (i.e., purchase contract, lease/purchase contract, maintenance contract, license contract, etc) in their proposal response. Respondent should ensure that ALL applicable contracts are included with their bid response, and that ONLY applicable contracts are included. Failure to provide contracts as instructed or to cause an unnecessary and untimely delay in getting contracts reviewed and signed may result in the rejection of the proposal.
 2. During the evaluation process (and prior to making an award recommendation), the Respondent(s) who appear successful in their proposal will have their contracts subjected to review by Tarrant County's District Attorney's office.

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

3. Following this review, the Respondent should incorporate any necessary changes or addenda into the contracts and quickly provide four (4) signed originals to Tarrant County for the County Judge to sign in the Commissioners Court when a contract award is made. Once award has been made, and the County Judge has signed the contracts, one (1) complete set will be returned to the Respondent by Tarrant County. **Failure of the Respondent to provide ALL applicable contracts in a timely and orderly manner may jeopardize award recommendation.**

F. Section 6 – Required Forms

1. Proposal Signature Form, with signature
2. Certificate of Eligibility, with signature
3. Addendum Cover page, with signature (if applicable)
4. Deficiencies and Deviations Form
5. Insurance Certificates
6. Form for Disadvantaged Business Enterprises (if applicable)
7. HUB Certifications (if applicable)
8. Subcontractor Forms (if applicable)
9. Systems Requirements Check list

IX. Alternate Approaches

- A. If Respondent wishes to propose a business offering which incorporates different primary business partners, Respondent must submit separate Proposals incorporating each proposed project team.
- B. If Respondent wishes to submit multiple project approaches or solution(s) using the same proposed project team, Respondent may submit alternative solutions within a single Proposal provided that each alternative solution must independently and completely satisfy the mandatory requirements of this RFP on its own merits. The intention of allowing alternative solutions is to consider all business solutions for evaluation and award based solely upon the best interests of the County.
- C. If Respondent wishes to submit a hosted solution, the solution must satisfy the requirements of this RFP on its own merits, understanding that some of the installation related requirements may not apply. The costing should include a Fixed Fee pricing for setup and initialization along with a detailed list of ongoing service fees. The intention of allowing alternative solutions is to consider all business solutions for evaluation and award based solely upon the best interests of the County.

The County is under no obligation to consider alternative approaches.

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

X. Subcontractor(s) Declaration

- A. Use of subcontractors for this project is subject to the provisions of this RFP. If subcontractors are proposed for this contract, including wholly owned corporate subsidiaries, the Proposal shall include a description of all proposed subcontractors on the forms set forth in *Subcontractor(s) Declaration* (Pages 21 and 22).

XI. Proposal Evaluation and Award

A. Approach

- 1. The Tarrant County Purchasing Department will guide the evaluation of the responses received. An Evaluation Committee will be established to evaluate and score the submitted Proposals. The Evaluation Committee may consist of representatives from various County Departments.
- 2. The County reserves the right at its sole determination to include additional Department(s), Employee(s), or Contractor(s) in the evaluation of proposals, as the County deems necessary.
- 3. The County reserves the right at its sole discretion to determine the process for proposal evaluation and may elect to accelerate the evaluation process by combining or eliminating evaluation phases, if it is deemed in the public interest to do so.

B. Evaluation Criteria

The following criteria will be used determine the ranking of the proposals:

- 1. Project approach and management..... 0 – 20 points
 - a. Timeline or milestone schedules
 - b. Proposed mechanism for legacy data migration and test environment
- 2. Cost..... 0 – 30 points
 - a. Cost of system/services
- 3. Company background/history..... 0 – 20 points
 - a. Length of time in business, including the length of time the company has been providing services for constituent management systems.
 - b. Listing of current/pending installations, including the number of licensed users
 - c. Any material (including letters of support) indicating current capabilities and past performance in meeting implementation deadlines
 - d. Response of references

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

- 4. Fit of the system to the business model and needs of Tarrant County: 0 – 30 points
 - a. Quality of responses on the bid checklist
 - b. Comprehensiveness and organization of proposal
 - c. Understanding of the project

D. Evaluation of Cost Proposal

- 1. Responses will be evaluated separately to score the Cost Proposal using the following formula:
$$\frac{\text{Lowest Cost Proposal}}{\text{Vendor Cost Proposal}} \times 30.$$

Maximum Cost Proposal Points: 30 points

E. Product Demonstration

- 1. The vendors with highest initial scores may be invited to provide a demonstration of proposed system to the Evaluation Committee to be conducted within ten (10) days of vendor notification of request. Demonstration may be in person or via virtual meeting environment. Demonstrations will last no longer than two (2) hours. A script will be provided, and is anticipated to include at a minimum the following:
 - a. Demonstrate the basic operation and user interface of the system for entering and tracking Commissioner’s casework.
 - b. Demonstrate management tools for assignment and tracking of workflows and for statistical reporting.
 - c. Demonstrate knowledge bank capabilities.
- 2. Scoring of the demonstrations will be based on the same criteria used for the initial ranking. The demonstration score for these vendors will override the initial ranking score.
- 3. Tarrant County reserves the right at its sole discretion to determine if oral presentation(s) are in the best interest of the County. Tarrant County is under no obligation to request demonstrations.

F. Best and Final Offer (BAFO)

- 1. The Proposals with the highest scores may be invited to prepare a Best and Final Offer for consideration by the Evaluation Committee.
- 2. Tarrant County reserves the right at its sole discretion to determine if pursuing BAFO(s) is in the best interest of the County. The County is under no obligation to pursue BAFO(s).
- 3. In the event, the County elects not to pursue BAFO(s); Contract Negotiation will be conducted based on the Final Rankings previously described.

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

G. Contract Negotiation

1. The Tarrant County Purchasing Department may conduct Contract Negotiations along with representatives from Commissioner's Offices and Information Technology Departments.
2. The County reserves the right at its sole discretion to determine if pursuing Contract Negotiation is in the best interest of the County. The County is under no obligation to pursue Contract Negotiation.

XIII. Inducements

- A. Tarrant County submits this RFP setting forth certain information regarding the objectives of implementation of the Constituent Management System and Tarrant County's desire to mitigate risk throughout the life of this Project by using expert vendor services. Therefore, Tarrant County will consider the Respondent's response to this RFP all representations contained in the Proposal, presentations, other printed material, correspondence, discussions, and reliance upon the expertise of the Respondent(s) in performing similar activities for entities such as Tarrant County. Tarrant County accepts these representations as inducements to enter into a mutually beneficial relationship with the Respondent(s) under the terms and conditions of this RFP.



TARRANT COUNTY

HISTORICALLY UNDERUTILIZED BUSINESSES (HUB) POLICY

I. POLICY STATEMENT

The Tarrant County Commissioners Court, being the policy development and budgetary control unit of county government, will strive to ensure that all businesses, regardless of size, economic, social or ethnic status have an equal opportunity to participate in the County's procurement processes. The County is committed to promote full and equal business opportunity for all businesses to supply the goods and services needed to support the mission and operations of county government, and seeks to encourage the use of certified historically underutilized businesses (HUBs) through the use of race, ethnic and gender neutral means. It is the policy of Tarrant County to involve certified HUBs to the greatest extent feasible in the County's procurement of goods, equipment, services and construction projects while maintaining competition and quality of work standards. The County affirms the good faith efforts of firms who recognize and practice similar business standards.

II. DEFINITIONS

Historically underutilized businesses (HUBs), also know as a disadvantaged business enterprise (DBE), are generally business enterprises at least 51% of which is owned and the management and daily business operations are controlled by one or more persons who is/are socially and economically disadvantaged because of his or her identification as a member of certain groups, including women, Black Americans, Mexican Americans and other Americans of Hispanic origin, Asian Americans and American Indians.

Certified HUBs includes business enterprises that meet the definition of a HUB and who meet the certification requirements of certification agencies recognized by Tarrant County.

Businesses include firms, corporations, sole proprietorships, vendors, suppliers, contractors, subcontractors, professionals and other similar references when referring to a business that provides goods and/or services regardless of the commodity category.

Statutory bid limit refers to the Texas Local Government Code provision that requires competitive bidding for many items valued at greater than \$50,000.

III. POLICY GUIDELINES

- A. Tarrant County, its contractors, their subcontractors and suppliers, as well as all vendors of goods, equipment and services, shall not discriminate on the basis of race, color, creed, gender, age, religion, national origin, citizenship, mental or physical disability, veteran's status or political affiliation in the award and/or performance of contracts. All entities doing business or anticipating doing business with the County shall support, encourage and implement affirmative steps toward a common goal of establishing equal opportunity for all citizens and businesses of the county.
- B. Tarrant County will use and recognize the State of Texas certification process in conjunction with the implementation of this policy. The County may recognize other agencies' certification processes recognized by the State of Texas. Tarrant County reserves the right to review the certification status of any vendor applying to do business with the County. This review will be accomplished to determine the validity and authenticity of the vendor's certification as a HUB.
- C. The Commissioners Court may establish HUB target goals. Through a systematic approach of soliciting quotes, bids and proposals from certified HUBs and in compliance with applicable state and federal law this policy will strive to meet those goals.
 1. Target goals should consider:
 - the availability of HUB firms within the specific category of goods or services to be procured; and
 - the diversity of the county's population.
 2. The goals should be reviewed and amended periodically.
 3. The program may apply to all County procurements including construction and professional services.
 4. Particular attention will be given to HUB participation on purchases in excess of the statutory bid limit.
 5. The Commissioners Court herein establishes a 20% good faith target goal for Tarrant County.

- D. Tarrant County will actively seek and encourage HUBs to participate in all facets of the procurement process by:
1. Continuing to increase and monitor a database of certified HUB vendors, professionals and contractors. The database will be expanded to include products, areas of expertise and capabilities of each HUB firm.
 2. Continuing to seek new communication links with HUB vendors, professionals and contractors to involve them in the procurement process.
 3. Continuing to advertise bids on the County's website and in newspapers including newspapers that target socially and economically disadvantaged communities.
 4. Continuing to provide copies of bid specifications to minority Chambers of Commerce.
- E. As prescribed by law, the purchase of one or more items costing in excess of the statutory bid limit must comply with the competitive bid process. Where possible, those bids will be structured to include and encourage the participation of HUB firms in the procurement process by:
1. Division of proposed requisitions into reasonable lots in keeping with industry standards and competitive bid requirements.
 2. Where feasible, assessment of bond and insurance requirements and the designing of such requirements to reasonably permit more than one business to perform the work.
 3. Specification of reasonable, realistic delivery schedules consistent with the County's actual requirements.
 4. Specifications, terms and conditions reflecting the County's actual requirements are clearly stated, and do not impose unreasonable or unnecessary contract requirements.
- F. A HUB Policy statement shall be included in all specifications. The County will consider the bidder's responsiveness to the HUB Policy in the evaluation of bids and proposals. Failure to demonstrate a good faith effort to comply with the County's HUB policy may result in a bid or proposal being considered non-responsive to specifications.
- G. The Purchasing Department will actively seek the participation of HUB firms in the quotation process for purchases under the statutory bid limit. HUB firms will be identified on the computerized database and linked to the commodities they represent. Buyers will be encouraged to use available internal and external databases of certified HUB firms.

- H. Nothing in this policy shall be construed to require the County to award a contract other than to the lowest responsive bidder as required by law. This policy is narrowly tailored in accordance with applicable law.

IV. ADMINISTRATIVE GUIDELINES

- A. The Purchasing Department shall serve as the County's HUB Office with responsibility for the implementation, monitoring and general operations of the HUB policy. The Purchasing Agent shall serve as the County HUB Officer.
 - 1. The HUB Officer will establish procedures to implement this policy across the full spectrum of the procurement process. The County HUB Office will periodically review with department head and elected officials regarding procurement opportunities.
 - 2. Managing the policy and training buyers and other County personnel in order to meet County goals will be the responsibility of the HUB Office.
 - 3. The HUB Office will cooperate with other local government entities to increase HUB participation throughout the county and region. The HUB Office is encouraged to participate in educational and other outreach programs to assist HUB firms.
 - 4. The HUB Officer will receive and review complaints and recommendations regarding the implementation of the HUB Policy and the good faith efforts of bidders. Further, the HUB Office will audit for compliance to the HUB Policy on eligible projects after award, during the performance of the contract and after completion, while also making any recommendations to Commissioners Court regarding any irregularities or misrepresentation of facts as they relate to compliance with the policy. The HUB Office will review documentation submitted by HUB firms in compliance with this policy.
 - 5. An annual report along with recommendations shall be provided to the Commissioners Court and Purchasing Board. The annual report will provide statistical data and efforts reflected in the number of purchase orders, value of goods and services purchased, percentages to HUB firms, and outreach and marketing efforts. Other statistics may be required or requested by the Commissioners Court or Purchasing Board.

510 Historically Underutilized Businesses Policy

Adopted: Court Order 64788 (December 17, 1990)

Amended: Court Order 69958 (December 7, 1993)

Amended: Court Order 99651 (December 28, 2006)

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

FOR DISADVANTAGED BUSINESS ENTERPRISES ONLY

Disadvantaged Business Enterprises (DBE) are encouraged to participate in Tarrant County's bid process. The Purchasing Department will provide additional clarification of specifications, assistance with Bid Proposal Forms, and further explanation of bidding procedures to those DBEs who request it.

Representatives from DBE companies should identify themselves as such and submit a copy of the Certification.

The County recognizes the certifications of both the State of Texas General Services Commission HUB Program and the North Central Texas Regional Certification Agency. All companies seeking information concerning DBE certification are urged to contact.

Texas Procurement and Support Services
Statewide HUB Program
1711 Jacinto Blvd.
PO Box 13047
Austin, TX 78711-3047
(512) 463-5872

OR

North Central Texas
Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, TX 76011
(817) 640-0606

If your company is already certified, attach a copy of your certification to this form and return with proposal.

COMPANY NAME: _____

REPRESENTATIVE: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

TELEPHONE NO. _____ FAX NO. _____

Indicate all that apply:

- _____ Minority-Owned Business Enterprise
- _____ Women-Owned Business Enterprise
- _____ Disadvantaged Business Enterprise

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

VENDOR REFERENCES

Please list three (3) references, **other than Tarrant County**, who can verify your performance as a vendor. Performance includes but shall not be limited to, sales and/or service, delivery, invoicing, and other items as may be required for Tarrant County to determine your firm's ability to provide the intended goods or service of this RFP. The County prefers references to be from customers for whom your firm has provided the same items (sales and/or services) as those specified in this RFP. Inaccurate, obsolete or negative responses from the listed references could result in rejection of your proposal.

REFERENCE ONE

GOVERNMENT/COMPANY NAME: _____
ADDRESS: _____
CONTACT PERSON AND TITLE: _____
TELEPHONE NUMBER: _____
E-MAIL ADDRESS: _____
SCOPE OF WORK: _____
CONTRACT PERIOD: _____

REFERENCE TWO

GOVERNMENT/COMPANY NAME: _____
ADDRESS: _____
CONTACT PERSON AND TITLE: _____
TELEPHONE NUMBER: _____
E-MAIL ADDRESS: _____
SCOPE OF WORK: _____
CONTRACT PERIOD: _____

REFERENCE THREE

GOVERNMENT/COMPANY NAME: _____
ADDRESS: _____
CONTACT PERSON AND TITLE: _____
TELEPHONE NUMBER: _____
E-MAIL ADDRESS: _____
SCOPE OF WORK: _____
CONTRACT PERIOD: _____

THE ORIGINAL AND FOUR (4) COPIES OF THIS FORM MUST BE RETURNED WITH PROPOSAL

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

PROPOSAL SIGNATURE FORM

The undersigned agrees this proposal becomes the property of Tarrant County after the official opening.

The undersigned affirms he has familiarized himself with the local conditions under which the work is to be performed; satisfied himself of the conditions of delivery, handling and a storage of equipment and all other matters which may be incidental to the work, before submitting a proposal.

The undersigned agrees if this proposal is accepted, to furnish any and all items/services upon which prices are offered, at the price(s) and upon the terms and conditions contained in the Specifications. The period for acceptance of this Proposal will be ninety (90) calendar days unless a different period is noted by the proposer/respondent.

The undersigned affirms that they are duly authorized to execute this contract, that this proposal has not been prepared in collusion with any other Proposer/Respondent, nor any employee of Tarrant County, and that the contents of this proposal have not been communicated to any other proposer/respondent or to any employee of Tarrant County prior to the official opening of this RFP.

Vendor hereby assigns to purchaser any and all claims for overcharges associated with this contract which arise under the antitrust laws of the United States, 15 USCA Section 1 et seq., and which arise under the antitrust laws of the State of Texas, Tex. Bus. & Com. Code, Section 15.01, et seq.

The undersigned affirms that they have read and do understand the specifications and any attachments contained in this RFP package. ***Failure to sign and return this form will result in the rejection of the entire proposal.***

NAME AND ADDRESS OF COMPANY:

Tel. No. _____

E-Mail Address: _____

AUTHORIZED REPRESENTATIVE:

Signature _____

Date _____

Name _____

Title _____

FAX No. _____

AFTER HOURS EMERGENCY CONTACT:

Name: _____

Tel. No. _____

COMPANY IS:

Business included in a Corporate Income Tax Return? _____ YES _____ NO

____ Corporation organized & existing under the laws of the State of _____

____ Partnership consisting of _____

____ Individual trading as _____

____ Principal offices are in the city of _____

THIS FORM MUST BE SIGNED AND THE ORIGINAL AND FOUR (4) COPIES RETURNED WITH PROPOSAL

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

CERTIFICATION OF ELIGIBILITY

(This provision applies if the anticipated contract exceeds \$25,000)

By submitting a bid or proposal in response to this solicitation, the bidder/proposer certifies that at the time of submission, he/she is not on the Federal Government's list of suspended, ineligible, or debarred contractors.

In the event of placement on the list between the time of bid/proposal submission and time of award, the bidder/proposer will notify the Tarrant County Purchasing Agent. Failure to do may result in terminating this contract for default.

Authorized Signature

THIS FORM MUST BE SIGNED AND THE ORIGINAL AND FOUR (4) COPIES RETURNED WITH PROPOSAL

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

FORMS/DOCUMENTS CHECKLIST

| | |
|------------------------|---|
| ✓ Indicates Compliance | <p>A check mark (✓) in the space provided indicates these forms/documents have been completed and are included in your bid package. The original and one (1) copy of all forms/documents should be submitted. Failure to check all items could result in rejection of the entire bid. All deviations from specifications must be documented separately and included with bid package.</p> |
| | <p>1. Vendor References. Respondent has provided three (3) references, other than Tarrant County. References must be able to verify the quality of service your company provides and that your company has completed a project of similar size and scope of work to this RFP.</p> |
| | <p>2. Signatures. All forms requiring a signature must be signed. Proposals not signed will not be considered for award.</p> |
| | <p>3. Proposal Response Forms. Forms for Proposed Subcontractors, Proposed Subcontractor Information and Proposal Financial Response have been completed and are include with proposal.</p> |
| | <p>4. Insurance Certificates (If required). Respondents must submit all Insurance Certificates with Proposal. If no insurance requirements specified, mark N/A.</p> |
| | <p>5. Addenda. When applicable, Respondent acknowledges receipt of all addenda and has included the signed Addenda cover pages and any revised Proposal Forms in their proposal package.</p> |
| | <p>6. It is the Respondents' sole responsibility to print and review all pages of the RFP document, attachments, questions and their responses, addenda and special notices. The Proposal Signature Form must be signed and returned. Failure to provide signature on this form renders proposal non-responsive. Failure to complete and the submission of all required forms, including but not limited to the Reference Page, Certification of Eligibility, Checklist, Questionnaires (when applicable), Addenda (including revised forms), and any other specified forms or documents will be grounds for rejection of entire proposal.</p> |
| | <p>7. Accuracy for all mathematical and number entries is the sole responsibility of the Respondent. Tarrant County will not be responsible for errors made by the Respondent.</p> |
| | <p>8. Respondent's company is registered on TVORS (Tarrant On-Line Vendor Registration System)</p> |
| | <p>9. Failure to comply with the requirements set forth in this RFP may result in rejection of bid and/or cancellation of contract after award.</p> |

THE ORIGINAL AND FOUR (4) COPIES OF THIS FORM MUST BE RETURNED WITH PROPOSAL!

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

DEFICIENCIES AND DEVIATIONS FORM

Following is a listing of ALL deficiencies and deviations from the requirements and/or provisions as outlined in this Request for Proposals and Qualifications. Unless specifically listed here, your response will be considered to be in FULL compliance with the RFP. Respondent assumes the responsibility of identifying all deficiencies and deviations and if not identified, all requirements of the RFP stipulated must be fulfilled at no additional expense to Tarrant County.

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

Proposed Subcontractors

Provide an overview of subcontractors proposed for the Project, if any. Proposer must provide further description of each subcontractor on the following sheets, and must include Subcontractor Information for each proposed subcontractor.

(List in descending order [largest to smallest] of scope of services provided to project.)

| Subcontractor Name | Team Size | Role | Responsibilities |
|---------------------------|------------------|-------------|-------------------------|
| | | | |
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REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

Proposer/Subcontractor Information

An authorized representative of Proposer/Subcontractor who is legally authorized to certify the information requested in the name of and on behalf of the Proposer/Subcontractor is required to complete and sign the Required Certifications. All of the requested information and certifications must be provided in order to be eligible for award. Proposer/Subcontractor's authorized representative must certify as to the truth of the representations made by signing where indicated below.

| Proposer/Subcontractor Information | |
|---|--|
| Name: | |
| Entity's Legal Form: | <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other _____ |
| Address: | |
| Designated Contact: | |
| Phone: | |
| Fax: | |

The undersigned: (1) recognizes that the following representatives are submitted for the express purpose of assisting Tarrant County in making a determination to award a contract and/or approve a subcontract; (2) acknowledges and agrees by submitting the Certification, that the County may at its discretion, by means which it may choose, verify the truth and accuracy of all statements made herein; (3) acknowledges that intentional submission of false or misleading information may constitute a felony; and (4) certifies that the information submitted in this certification and any attached documentation is true, accurate and complete.

Signature of Proposer/Subcontractor

Printed Name

Title

Business Entity

| |
|--|
| REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM |
|--|

Proposed Financial Response: On Premises Solution

Please fill out this Financial Response if the solution will be installed **on site at Tarrant County**. Costs included below are to be all-inclusive, including all labor, materials, shipping, transportation, and travel to complete work. Tarrant County will be providing necessary computer servers, desktops and data storage equipment with existing equipment or via a separate bid process.

| Products/Service Description | Cost |
|--|----------|
| Software Licenses (Detail any individual modules/components): | |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |

All services required from initial planning through go-live (development, Customization, data migration, travel, training, testing, etc.) Please itemize. For proposal purposes, the initial number of users is **14**.

| Service Description | Cost |
|---------------------|----------|
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |

REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM

Annual Maintenance/Support – Year 1

| Software Support (Detail components below) | Cost |
|--|-------------|
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |

Annual Maintenance/Support – Year 2

| Software Support (Detail components below) | Cost |
|--|-------------|
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |

Total Cost of Project, including Products/Services and Two (2) Years M/S: \$ _____

| |
|--|
| REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM |
|--|

Proposed Financial Response: Hosted Solution

Please fill out this Financial Response if the solution will be **Hosted** off site. Costs included below are to be all-inclusive, including all labor, materials, shipping, transportation, and travel to complete work. Vendor will be providing all computer hardware and software necessary to provide the off site solution. Tarrant County will be providing all desktops, laptops, etc... with existing equipment or via a separate bid process.

| Products/Service Description | Cost |
|--|-------------|
| Software Licenses (Detail any individual modules/components): | |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |

All services required from initial planning through go-live (development, Customization, data migration, travel, training, testing, etc.) Please itemize.

| Service Description | Cost |
|----------------------------|-------------|
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |

| |
|--|
| REQUEST FOR PROPOSALS FOR CONSTITUENT MANAGEMENT SYSTEM |
|--|

All Monthly or Annual Fees associated with the Hosted Solution (including monthly costs per user.)
 For proposal purposes, the initial number of users is **14**.

| Description | Cost |
|-------------|----------|
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |
| | \$ _____ |

Total Cost of Project, including Products/Services and
 Two (2) Years Monthly/Annual Fees Associated with
 Hosted Solution: \$ _____