



WORKFORCE SOLUTIONS of the Coastal Bend

TO: Interested Parties

FROM: Ken Trevino, President/CEO

DATE: November 5, 2019

SUBJECT: REQUEST FOR PROPOSALS (RFP) FOR IT ASSESSMENT & STRATEGIC PLAN

Coastal Bend Workforce Development Board, d.b.a. Workforce Solutions of the Coastal Bend, is soliciting proposals from professional, qualified firms or individuals. The description of the services solicited is provided in the attached RFP. Included in the RFP are the minimum requirements as it pertains to the responsiveness to the RFP, qualifications, related experience, demonstrated ability/references, and cost.

All inquiries should be directed to Robert Ramirez at (361) 885-3013 or robert.ramirez@workforcesolutionscb.org. Mailed and hand delivery of the documents are acceptable. Faxed or electronic transmitted copies will not be accepted.

Workforce Solutions of the Coastal Bend is an Equal Opportunity Employer/Program. Auxiliary aid and services are available upon request to individuals with disabilities. Telephone access is available by dialing Relay Texas: 1-800-735-2989 and 1-800-735-2988 or 7-1-1 (Voice). Historically Underutilized Businesses (HUB's) are encouraged to apply.

Babel Notice: This document contains vital information about requirements, rights, determinations, and/or responsibilities for accessing workforce system services. Language services, including the interpretation/translation of this document, are available free of charge upon request.

Este documento contiene información importante sobre los requisitos, los derechos, las determinaciones y las responsabilidades del acceso a los servicios del sistema de la fuerza laboral. Hay disponibles servicios de idioma, incluida la interpretación y la traducción de documentos, sin ningún costo y a solicitud.

REQUEST FOR PROPOSALS

Issued by



WORKFORCE SOLUTIONS of the Coastal Bend

For

INFORMATION TECHNOLOGY ASSESSMENT & STRATEGIC PLAN

Responses to be submitted to the

Coastal Bend Workforce Development Board (d.b.a. Workforce Solutions)

520 North Staples, Corpus Christi, TX 78401 (if hand delivered)

P.O. Box 2568, Corpus Christi, TX 78403 (if mailed)

Issue Date: November 5, 2019, 2:00 p.m. (C.S.T.)

Copies of the Request for Proposals (RFP) are available November 5, 2019, 2:00 p.m. (C.S.T.)

Pre-Proposal Conference: Friday, November 15, 2019, 2:00 p.m. (C.S.T.)

Proposal Submission Date: Tuesday, December 3, 2019, 4:00 p.m. (C.S.T.)

Procurement is open and subject to the availability of funds.

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Workforce Solutions is an Equal Opportunity employer/program. Historically Underutilized Businesses (HUB's) are encouraged to apply. Auxiliary aids and services are available upon request to individuals with disabilities. Telephone access is available by dialing 711 or you can also call (512) 936-0342; (TDD): 1-800-735-2989, Voice 1-800-735-2988.

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PART 1.0 – GENERAL INFORMATION

1.1 General Description of WFSCB and the Coastal Bend Region

Workforce Solutions of the Coastal Bend (WFSCB) is a non-profit, tax-exempt organization that serves as the Workforce Development Board. WFSCB oversees workforce development programs in the Coastal Bend region. As the grant recipient and administrative entity, WFSCB is responsible for the planning, evaluation, and oversight of workforce related programs. WFSCB primarily receives funding from the United States Department of Labor through the Texas Workforce Commission (TWC).

WFSCB serves an 11-county region consisting of the following counties: Aransas, Bee, Brooks, Duval, Jim Wells, Kennedy, Kleberg, Live Oak, Nueces, Refugio, and San Patricio. The services provided are revolved around the two urban Career Centers located in Corpus Christi, Texas. Other career centers are located in the following cities: Sinton, Alice, Beeville, and Kingsville. WFSCB also operates satellite offices in Falfurrias and Rockport.

As part of the Texas Workforce Solutions local and statewide network, we offer an array of services to our customers. The network gives customers local access to an integrated workforce solutions and statewide services at our Workforce Solutions' offices located in the Coastal Bend region.

WFSCB provides workforce development services that helps workers seek and retain employment, and help employers hire the skilled workers they need to grow their business. Our workforce partners include community colleges, adult basic education providers, local independent school districts, economic development entities, businesses and other local governmental agencies.

The WFSCB Board Administration employs 29 employees to administer local grant funds and plan and oversee the programs that are contracted out to our service providers. The largest service providers that manage and operate the career centers and child care programs employs approximately a total of 110 employees. Additionally, other partner agencies co-housed at our centers include approximately 7 to 10 employees. All employees have full access to technology, while a large number have restricted rights to customer/participant data. The customers we serve have access to technology, as well as the workforce solutions and state network services at our six career centers, satellite offices, and mobile career center.

Our mission is to invest in our regional economic success through access to jobs, training, child care, youth programs and employer services. To accomplish this mission the WFSCB has adopted the following strategies:

- Collaborate with industry, education, economic development and labor to develop a comprehensive regional workforce strategic plan;
- Develop a trainable and available workforce;
- Provide workforce-relevant educational and training opportunities for youth;
- Provide child care assistance to eligible families for employment and training activities.

1.2 Background Information

Our Information and Technology (IT) Network System is housed and maintained at one of our career centers located in Corpus Christi, Texas. The network system operates in a WAN environment using a Cisco networking gear. All desktops and laptops are standardized on Microsoft tools, and so are all servers and nearly all databases.

Our local IT department employs three individuals to maintain the network infrastructure and handle all technological issues. The department is comprised of an IT Manager and two service support technicians. Specifically, the IT team is responsible for making sure that the technology used is up to industry standards and upgraded periodically. The IT team evaluate and install the proper hardware and software necessary to keep the network functioning properly. Additionally, they are also responsible for ensuring the network systems are secured.

As with all network systems, depending on its complexity, when issues occur the IT department may need to seek outside professional assistance. In such cases, the IT department maintains a list of potential vendors and industry experts.

Aside from handling the computer network systems and hardware and software accessories, the IT team is responsible for maintaining the organization's communication systems functional and operating smoothly. This includes telephone systems with conferencing capabilities, and video and web conferences, as well as less direct forms of electronic communications like network drives, email systems, and secure servers. Finally, the IT department is also responsible for procuring all its technological equipment and services.

Currently, the IT department supports the following systems:

- Windows 10
- Windows 7
- Server 2012 – 4 individual servers
- Meraki Switches
- Avaya Phone Systems

1.3 Purpose of Request for Proposals (RFP)

WFSCB is seeking a professional, qualified firm or individual to conduct an independent information and technology (IT) assessment and develop a strategic plan. The purpose of this RFP is to solicit responses that may result in a contract with a qualified contractor to obtain services. WFSCB anticipates exploring any viable alternative for providing these services and may decide, after reviewing proposals submitted, not to enter into any agreement.

1.4 Eligible Respondents

Individuals or organizations possessing the capacity and demonstrated ability to perform successfully under the terms and conditions of a contract with WFSCB may respond to this RFP. WFSCB intends to contract with a qualified respondent based upon the qualifications and experience of the respondent and the categories of services it is able to provide. The evaluation criteria to be used to select a contractor is noted on pages 14 and 15.

Minority, disadvantaged, veteran and/or women-owned businesses are encouraged to respond to this RFP.

1.5 Scope of Services

WFSCB would like to have the current IT system evaluated to determine if there are efficiencies that could be implemented currently. Additionally, we would like to look at our future growth and determine additional IT needs such as infrastructure, equipment, software, etc. Future projects may or may not include: a new paperless software system, cloud or on-site managed, increase speed and capacity across region, multiple location moves, and addition of staff.

The plan submitted should assess current and provide recommendations for future technology needs, based upon industry best practices. This includes technology systems, telecommunications, hardware, software,

and staffing to support Information Technology (IT) operations.

Specific services necessary to produce the stated deliverables include, but are not necessarily limited to, the following:

- A review and assessment of WFSCB currently use of technology resources and staff access to technology services;
- Evaluation of our current organizational structure;
- A capability assessment for processes and skills. This should include recommendations for how to be more productive with the resources that we have and ensure alignment of IT capabilities (i.e., people, skill sets, process, and technology), with the needs of our IT operations.
- Evaluation of the department's support for a possible move to include a new paperless software system, cloud or on-site managed; support for increase speed and capacity across the region; multiple location moves; and addition of staff.
- Analysis of current technology stack for network, storage, mobile computing, back-up, database, desktop, and communications. Are we on track that will meet our future needs and, if not, what should be changed?
- Identification of opportunities for significant improvements in IT operations (e.g. identifying emerging technology needs, upgrades) and for new ways that IT can add substantial value to WFSCB.
- Provide recommendations for improving the security of our computer network systems and how to avoid temporary shut downs due to power outages.

1.6 Deliverables

Deliverables will include the following:

- A Strategic Plan which will address all the topics listed herein and any others identified in the process of WFSCB staff and other stakeholders discussions.
- Progress Reports – The consulting firm will report to the WFSCB Project Team and shall submit written progress reports summarizing major results of the analyzes. The firm will incorporate a schedule for presenting the reports to the WFSCB project team.
- Draft Plan – A draft strategic plan, comprised of a management summary, findings, and prioritized recommendations shall be presented prior to being directed to proceed with a final plan.
- Final Strategic Plan – A final strategic plan comprised of:
 - a. An Executive Summary which is directed to the WFSCB Project Team.
 - b. A summary of key findings and prioritized recommendations that addressed the RFP's intent,
 - c. A comprehensive documentation of findings and prioritized recommendations, and
 - d. A strategic project plan outlining projects by priority that includes timelines and cost estimates.

1.7 Constraints on the Contractor

The Contractor will perform all work under the direction of the President/CEO and its project team. The Contractor must provide a point of contact.

1.8 WFSCB Responsibilities

WFSCB will provide the Contractor access to all personnel and IT resources necessary for completion of the work to be performed.

1.9 Subcontracting

Any subcontracting must be specified in the response and approval must be granted by the WFSCB prior to the execution of any contract resulting from this RFP. All subcontracting is subject to applicable federal, state, and local laws, rules and regulations and policies. If the respondent proposes to subcontract any of the above services and activities to be provided, the respondent must indicate which services and activities will be subcontracted and the rationale behind using subcontractors instead of providing the services directly. The respondent must also describe how subcontractors were (or will be) procured and selected, their qualifications, as well as the basis for payments. Subcontractors are subject to the same requirements as the respondent under this RFP and resultant contract.

PART 2.0 - CONTRACT INFORMATION

2.1 Award Notification

WFSCB intends to contract with a qualified respondent based upon the qualifications and the categories of services it is able to provide. The actual amount of a contract award will be based on the proposed budget, availability of funds, and the standards for the use of the funds (i.e., all costs must be reasonable and necessary to carry out the planned functions, allowable, and allocable to the proper grant/cost categories.)

2.2 Contract Period and Contract Renewals

The initial contract will be awarded for a period of approximately nine months ending on September 30, 2020. The contract may be renewed for an additional one-year period beyond the original acceptance award for a total not to exceed two (2) years. The contract renewals are at the discretion of the WFSCB and is based on need, availability of funds, satisfactory performance, and successful contract negotiations.

2.3 Contract Selection and Appeal Process

- I. All proposals considered must be responsive to the RFP instructions.
- II. WFSCB will base its selection on responsiveness to the RFP, qualifications, related experience, demonstrated ability/references, and cost.
- III. Any proposal receiving a score of less than "70" will be declared non-responsive.
- IV. WFSCB will make a good faith effort to award contracts to Historically Underutilized Businesses (HUB's).
- V. All proposers will receive notification of the award status. A proposer who wishes to appeal the decision will be required to notify WFSCB Complaint Officer, in writing, within fifteen (15) days from the date of the notification letter. The complainant letter must specify the nature of the appeal and any desired remedies of action. WFSCB reserves the right to determine whether the appeal is valid and merits further consideration.

2.4 Reassignment

In the event a contractor fails to perform as required, WFSCB reserves the right to terminate a contract early with a failing or non-compliant contractor(s) and sign a contract in whole or in part to another contractor obtained through this procurement, subject to successful contract negotiations.

2.5 Insurance

The Contractor will be required to maintain insurance coverage for the period of the contract. Contractor must obtain insurance adequate to cover contractor's employees and against personal and bodily injury and property damage. The following minimum insurance coverage and limitations will be required;

- General liability insurance for personal injury and bodily injury and property damage to a third party. The required minimum coverage shall be \$500,000 per occurrence or \$1,000,000 aggregate.
- Workers Compensation insurance shall be required for all the contractor's employees that will be working under this contract. However, if the contractor does not have the insurance coverage, but meets the definition of "Independent Contractor" as defined by the State of Texas, the contractor must sign a waiver agreeing to this independent relationship. The waiver form can be obtained upon request.

In the event you are awarded the contract, the contractor will be required to submit proof of insurance. A statement of assurance to that effect must be included in your transmittal letter.

2.6 Invoice for Payment

Payment for contracted services will be reimbursed by submitting an invoice with proper documentation by the tenth (10th) of each month for costs incurred during the previous month. The invoice will be submitted to the WFSCB's fiscal department for payment. Invoice will be paid within three (3) weeks of receipt of complete and accurate information.

Invoices(s) shall be submitted to the fiscal department via e-mail at: fiscal@workforcesolutionscb.org

2.7 Contract for Services

Unless otherwise noted, contract for services will be based on a cost-reimbursement basis. Costs will be paid based on the submittal of an invoice with all support documentation.

PART 3.0 - GOVERNING CONDITIONS AND LIMITATIONS

- 3.1 WFSCB reserves the right to accept or reject any or all proposals submitted.
- 3.2 WFSCB is exempt by law from payment of Texas Sales Tax and Federal Excise Tax.
- 3.3 This RFP does not commit WFSCB to pay for any cost incurred prior to the execution of any contract or payment agreement. All agreements are contingent upon availability of funds from the U.S. Department of Labor and/or Texas Workforce Commission.
- 3.4 The intent of this RFP is to identify the various contract alternatives and estimates of costs for the items solicited. WFSCB is under no legal requirement to execute a contract or payment agreement from any proposal submitted.
- 3.5 Respondents shall not make offers of gratuities or favors, to any officer, employee, Board member of WFSCB, or any subcontractor employees of WFSCB. Contact for technical assistance is allowed with the RFP contact person or designated WFSCB Board staff. Violation of this instruction will result in immediate rejection of the proposal. WFSCB specifically reserves the right to vary the provisions set herein any time prior to the execution of the contract or payment agreement where such variance is deemed to be in the best interest of WFSCB.

- 3.6 All proposals and their accompanying attachments will become property of the WFSCB after submission and materials will not be returned. In addition, all materials that are produced as a result of this RFP become property of WFSCB.
- 3.7 The contents of a successful proposal may become contractual obligations, if a contract or payment agreement is awarded. Failure of the applicant to accept those obligations may result in the cancellation of the proposal for selection. The contents and requirements of this RFP may be incorporated into any legally binding and duly negotiated contract between WFSCB and the selected proposer(s).
- 3.8 WFSCB reserves the right to select and/or contract with more than one respondent from the proposals submitted.
- 3.9 Costs incurred by a contracted entity in the delivery of services shall be reimbursed based on mutually-agreed on conditions and delivery schedules with the submission of appropriate documentation. Delivered services must meet standards agreed upon during contract negotiation before reimbursement is made.
- 3.10 Upon award of a contract, Contractors must provide proof of the following required insurance coverages: General Liability Insurance consisting of coverage for personal injury and bodily injury and property damage to a third party. The required minimum coverage shall be \$500,000 per occurrence or \$1,000,000 aggregate. If the Contractor does not have the required general liability insurance, WFSCB will assess the need for such insurance, on a case-by-case basis. Workers Compensation Insurance will be required for all employees that will be working under a contract with WFSCB. However, if the Contractor meets the definition of "Independent Contractor", as defined by the State of Texas, the Contractor must sign a waiver agreeing to this independent relationship. The waiver form can be provided upon request.
- 3.11 WFSCB is an Equal Opportunity Employer and complies fully with the nondiscrimination and equal opportunity provisions of the applicable laws. Each organization or individual that submits a response to a solicitation warrants and assures that it will comply fully with the nondiscrimination and equal opportunity provisions as required by 29 CFR 38.2(1). Each applicant for financial assistance under Title I of Workforce Innovation and Opportunity Act (WIOA), as defined in §38.4, must include the following assurance:

As a condition to the award of financial assistance from the Department of Labor under Title I of WIOA, the grant applicant assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

Section 188 of the Workforce Innovation and Opportunity Act (WIOA), which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA Title I—financially assisted program or activity;

Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color and national origin;

Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified Individuals with disabilities;

The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and

Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in

educational programs. The grant applicant also assures that it will comply with 29 CFR part 38 and all other regulations implementing the laws listed above. This assurance applies to the grant applicant's operation of the WIOA Title I-financially assisted program or activity, and to all agreements the grant applicant makes to carry out the WIOA Title I-financially assisted program or activity. The grant applicant understands that the United States has the right to seek judicial enforcement of this assurance.

PART 4.0 – PROCUREMENT SCHEDULE AND PRE-PROPOSAL CONFERENCE

4.1 Procurement Schedule*

RFP Issue Date	Tuesday, November 5, 2019, 2:00 p.m.
Pre-Proposal Conference	Friday, November 15, 2019, 2:00 p.m.
Period for Submittal of Written Questions	November 15-19, 2019, 5:00 p.m.
Issue Q&A (Question and Answer)	November 21, 2019, 5:00 p.m.
Proposal Submission Deadline	Tuesday, December 3, 2019, 4:00 p.m.
Submission Address	Workforce Solutions of the Coastal Bend 520 North Staples St., Corpus Christi, TX 78401 (if hand-delivered) P.O. Box 2568, Corpus Christi, TX 78403 (if mailed) RE: RFP for IT Assessment & Strategic Plan ATTN: Robert R. Ramirez, Contracts and Procurement Officer
Proposal Evaluation Period	December 5-10, 2019
Interviews (if needed)	December 5-10, 2-019
Projected Contract Start Date	January 2, 2020

**Dates are subject to change. Entities requesting a copy of the RFP will be notified in writing of any changes in the procurement schedule. Also, it is the responsibility of each respondent to check the website Q&A area for this RFP and for current information regarding any changes to the events pertaining to the award of this contract. All times indicated above are Central Standard Time (C.S.T.).*

4.2 Pre-Proposal Conference

A Pre-Proposal Conference to explain or clarify the RFP and to answer other questions will be held on Friday, November 15, 2019, 2:00 p.m., at 520 North Staples Street, Corpus Christi, TX 78401 (across from city hall), Conference Room #4. **Attendance at this conference is not mandatory, but strongly recommended.** However, for those individuals that are unable to attend the conference, you may participate via tele-conference. To register and view the presentation on your computer go to: <https://global.gotomeeting.com/join/830236949>. To listen to the conference and ask questions, dial in using your phone at: **+1 (312) 757-3121 Access Code 830-236-949.**

5.0 – PROPOSAL SUBMISSION REQUIREMENTS

5.1 – Administrative Guidance

The information provided herein is intended to assist Respondents in the preparation of proposals necessary to properly respond to this RFP. The RFP is designed to provide interested respondents with sufficient basic information to submit proposals meeting minimum requirements, but is not intended to limit a submission's content or to exclude any relevant or essential data there from. Proposers are at liberty and are encourage to expand upon the specifications to give additional evidence of their ability to provide the services requested in this RFP.

5.2 – Proposal Response Outline

Proposals must be concise and in outline format. Pertinent supplemental information should be referenced in the proposal and included as attachments. All proposals must be organized and tabbed to comply with the following sections:

Tab A – LETTER OF TRANSMITTAL. The letter of transmittal must be limited to two (2) pages and must contain:

- I. Respondent's name and any assumed names
- II. Physical and mailing address
- III. A brief statement of the Respondent's understanding of the work to be done and a summary of its Proposal.
- IV. The names, titles, addresses, e-mail addresses and telephone numbers of the primary contact and other individuals authorized to make representations on behalf of the Respondent.
- V. A statement that the person signing the transmittal letter is authorized to legally bind the Respondent.
- VI. A statement that the Proposal will remain in effect until a contract has been finalized and a written notice has been issued by WFSCB to the Awarded Contractor.
- VII. Signature of person(s) authorized to legally bind the Respondent.

Tab B – EXECUTIVE SUMMARY. An executive summary will briefly explain the respondent's understanding of the WFSCB's intent and “**how**” their proposal would achieve the scope of services requested. The summary must discuss respondent's strategy and methodology for successfully implementing and managing the project for WFSCB; capacity to perform, and approach to satisfying the scope of services in the RFP and any additional factors for the WFSCB consideration. Additionally, the respondent should clearly indicate any options or alternatives being proposed, as well as any major requirements that cannot be met by the respondent.

Tab C – QUALIFICATIONS & EXPERIENCE. Provide a brief history of your company, team, or individual. Describe your experience in leading strategic information technology efforts in a quasi-government/non-profit setting. Experience should demonstrate how you have helped identify your client's needs regarding the application of information technologies and developed strategies directing your clients toward achieving their stated goals. Attach resumes for all staff who will be involved in the management of the total package of services, as well as the delivery of specific services. Designate contact person(s) by title and responsibility for the following: assessment process, conducting presentations/interviews, providing progress reports, and developing the draft and final strategic plans. Also, if interviews are required during the selection process, please identify the person(s) who will be involved.

Tab D – DETAILED BUSINESS PLAN. This section should constitute the major portion of the proposal and must contain a specific response to each deliverable listed in Section 1.0, General Information, Sub-Section 1.6. Deliverables. **Indicate specific examples of how Contractor can meet each deliverable.** Failure to provide written response to items indicated in this RFP will be interpreted by WFSCB as an *inability* by the Contractor to provide the requested services or function.

Tab E – REFERENCES. Include at least three (3) references of proposer's customers who have used services similar to those requested by WFSCB. The clients must be three distinct customers. Please include this information in Attachment H. WFSCB reserves the right to contact or visit any of the Respondent's current and/or past customers to evaluate the level of performance and customer satisfaction. Please also include a list of past and present clients.

Tab F – AFFIRMATIVE ACTION PLAN. Include a copy of affirmative action plan for review (if applicable).

Tab G - MISCELLANEOUS. Miscellaneous additional information and attachments, if any, may be submitted by the Respondent.

Tab H – BUDGET INFORMATION. Submit information referenced in Section 5.4, Budget Information and complete and submit Attachment A as part of Tab H.

Tab I - ATTACHMENTS (CONTRACT CERTIFICATIONS AND ASSURANCES). Proposer must complete, sign, and submit the following certifications:

Attachment B: Certification Regarding Lobbying, Debarment, and Other Matters
Attachment C: Texas Corporate Franchise Tax
Attachment D: State Assessment Certification
Attachment E: Disclosure of Interest Certification
Attachment F: Undocumented Worker Certification
Attachment G: Customer Rights & Compliant Resolution Procedure
Attachment H: References Form

5.3 – Proposal Format

Respondents shall submit responses in a clear and concise manner in alignment with the outlined format listed above in Section 5.2, Qualifications Response Outline. Pertinent supplemental information should be referenced and included as attachments. Each proposer must submit an **ORIGINAL** with all executed (i.e. original signatures) forms and certificates and three (3) electronic copies of your response on flash drive for evaluation purposes. The information contain in the flash drives must mirror the information contained in your original proposal. Failure to submit the items stated under this Section and Part 5.0, Proposal Submission Requirements, will be ruled unresponsive to the specifications and will not be considered under this procurement.

Any differences between the original and the electronic copies are at the liability of the proposer. The original proposal must be marked “**ORIGINAL**” on the Cover Sheet and contain original signatures.

Fax or e-mailed or late proposals will be ineligible and not accepted for consideration.

It is the responsibility of the Respondent(s) to ensure that the proposal is received in WFSCB offices by the designated due date and time. WFSCB assumes no responsibility for delays caused by postage, mail courier deliveries, or any other form of delivery.

5.4 – Budget Information (Attachment A)

Please follow the instructions as provided on Attachment A. Include your proposed hourly rates/fees for the IT Assessment & Strategic Plan services under Attachment A, Budget. Additionally, if you require travel expenses, include these expenses separate from your hourly rates. Include your budget information as part of **TAB H**.

Proposed or negotiated costs must remain firm for the initial year of the contract. Increases in fees/costs after the initial year may be proposed. However, all proposed increases must be requested in writing and be supported by proper justification.

WFSCB follows the State Coordination of Travel rule and the GSA's federal Domestic Maximum Per Diem Rates. Travel costs may include lodging, meals, airfare, car rentals, and mileage. Travel reimbursements will not exceed the current State travel rates. Reimbursement requests for lodging, airfare, and car rentals will include receipts for actual cost.

Transportation expenses will be reimbursed only for the quickest and most economical means of transportation to reach the desired location. An individual choosing to take another means of transportation will be reimbursed only at the cost of the quickest and least expensive means of transportation. Car rental, taxi, and other forms of ground transportation must comply with this policy of quickest and most economical means. Coordination of travel must occur

when two, three, or four authorized travelers travel on the same dates with the same itinerary to conduct the same business. When coordination of travel is required, WFSCB may reimburse only one of the authorized travelers for mileage.

Costs for travel must have prior written approval from WFSCB. Due to unforeseen circumstances, WFSCB may need to re-schedule events. Consequently, WFSCB will make every effort to provide prior notice to contractors. However, if applicable, we advise contractors not to purchase non-refundable airfare tickets. WFSCB will not be responsible for reimbursing contractors for any unused non-refundable airfare tickets.

PART 6.0 – PROPOSAL EVALUATION AND SELECTION PROCESS

6.1 – Evaluation Process

WFSCB will evaluate proposals received and select the individual/firm on the basis of the following criteria:

The WFSCB staff reviews the responses received to determine if they are responsive. For proposals to be considered responsive and to be evaluated for selection, the following requirements must be met:

1. The responses must have been submitted within the RFP deadline.
2. The response that is labeled ORIGINAL must be complete with original signatures.
3. The responses must be for the specific services requested and described in the RFP packet.
4. The responses must be submitted in the format described in the RFP Packet.
5. One original (marked original) with all executed (i.e. original signatures) forms and certificates, and three (3) electronic copies of your proposal on flash drives must be submitted. WFSCB will base its selection on Responsiveness to RFP, Qualifications, Related Experience, Demonstrated Ability/References, and Cost. Respondents may earned additional points if they are currently certified as a HUB (Historically Under-Utilized Business) by the State of Texas Comptroller of Public Accounts.

All responses will be screened for inclusion of all required information prior to release to the evaluation team. WFSCB may exclude from further consideration for contract award any non-responsive response.

WFSCB may use Board staff, Board of Director members, independent evaluators or a combination of all to evaluate and rank proposals.

After evaluation, an award may be made on the basis of the evaluation and ranking, without discussion, clarification or modification, or the WFSCB may enter into negotiations with the highest ranked respondent. If the WFSCB is unable to reach agreement with the highest ranked respondent, the negotiations will terminate and negotiations will begin with the next respondent in the order of the ranking until a contract is reached or the Board has rejected all responses.

NOTE: After evaluation, any response with less than a total of 70 points will be considered as non-responsive and will be disqualified from further consideration. Responses receiving a final score of 70 or better are not guaranteed an award.

The WFSCB will make a good faith effort to award contracts to Historically Underutilized Businesses (HUBs).

6.2 – Proposal Evaluation Criteria

The review and selection process will include the following criteria and value system:

Responsiveness to RFP (Value 10 points)

This criterion examines the extent to which the minimum requirements of the RFP were met.

Qualifications (Value 20 points)

This criterion addresses the proposer's qualifications in the area of Information Technology and Strategic Plan services.

Related Experience (Value 30 points)

This criterion examines the knowledge and skills of the proposer which have been derived from actual work experiences in Information Technology and Strategic Plan services.

Demonstrated Ability/References (Value 20 points)

This criterion is a measure of the proposer's ability to deliver similar services. Additionally, the quality of references from current customers will also be evaluated for performance. References will be verified.

Cost (Value 20 points)

This criterion will determine if costs submitted are reasonable and necessary to perform the proposed services. WFSCB will consider costs, in terms of flexibility in costs and consistency with similar costs of similar services.

HUB Value 5 points

Historically Under-Utilized Business (HUB) as certified by the State of Texas. To earn points, the respondent must provide a current copy of the certification.

ATTACHMENT A

BUDGET INFORMATION

Respondent must provide an outline of pricing and cost information for the project. Respondent must provide a breakdown of all fees/costs including a breakdown of costs related to each task/activity/deliverable required to achieve desired outcomes.

Additionally, include hourly rates for all proposed team members and a total project cost. Respondents must discuss how their price/cost is broken down based upon billing rates.

If applicable, include pricing for any proposed equipment, software, or hardware costs and any related expenses for the project.

Please note if you will require travel expenses. Travel reimbursements must not exceed the current State travel rates. Reimbursement requests for lodging, airfare, and car rentals will include receipts for actual costs.

ATTACHMENT B

CERTIFICATONS REGARDING LOBBYING, DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS, AND DRUG-FREE WORKPLACE REQUIREMENTS

Lobbying: This certification is required by the Federal Regulations, implementing Section 1352 of the Program Fraud and Civil Remedies Act, Title 31 U.S. Code, for the Department of Education (34 CFR Part 82), Department of Health and Human Services (45 CFR Part 93).

The undersigned contractor certifies that:

- (1) No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan or cooperative agreement.
- (2) If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan or cooperative agreement, the undersigned shall complete and submit Standard Form – LLL, “Disclosure Form to Report Lobbying”, in accordance with its instructions.
- (3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

Debarment, Suspension, and Other Responsibility Matters: This certification is required by the Federal Regulations, implementing, Executive Order 12549, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned contractor certifies that neither it nor its principals:

- (1) Are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.
- (2) Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, State or Local) transaction or contract under a public transaction, violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (3) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity with commission of any of the offenses enumerated in Paragraph (2) of this certification; and,
- (4) Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the statements in this certification, such prospective recipient shall attach an explanation to this certification.

Drug-Free Workplace: This certification is required by the Federal Regulations, implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701; for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), and Department of Health and Human Services (45 CFR Part 76).

The undersigned contractor certifies that it shall provide a drug-free workplace by:

- (a) Publishing a policy statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;
- (b) Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the Contractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug abuse violations in the workplace;

- (c) Providing each employee with a copy of the Contractor's policy statement;
- (d) Notifying the employees in the Contractor's policy statement that as a condition of employment under this contract, employees shall abide by the terms of the policy statement and notifying the Contractor in writing within five days after any conviction for a violation by the employee of a criminal drug statute in the workplace;
- (e) Notifying the Commission within ten days of Contractor's receipt of a notice of a conviction of an employee; and,
- (f) Taking appropriate personnel action against an employee convicted of violating a criminal drug statute or require such employee to participate in a drug abuse assistance or rehabilitation program.

These certifications are a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction.

Name and Title of Authorized Representative

Signature

ATTACHMENT C

TEXAS CORPORATE FRANCHISE TAX CERTIFICATION

Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporation that are delinquent in making state franchise tax payments. The following certification that the corporation entering into this contract is current in its franchise taxes must be signed by the individual on Form 203, Corporate Board of Directors Resolution, to sign the contract for the corporation.

The undersigned authorized representative of the corporation contracting herein certifies that the following indicated statement is true and correct and that the undersigned understands making a false statement is a material breach of contract and is grounds for contract cancellation.

Indicate the certification that applies to your corporation:

_____ The Corporation is a for-profit corporation and certifies that it is not delinquent in its franchise tax payments to the State of Texas.

_____ The Corporation is a non-profit corporation or is otherwise not subject to payment of franchise taxes to the State of Texas.

Name and Title of Authorized Representative

Signature

ATTACHMENT D

STATE ASSESSMENT CERTIFICATION

The undersigned authorized representative of the corporation contracting herein certifies that the following indicated statement is true and correct and that the undersigned understands making a false statement is a material breach of contract and is grounds for contract cancellation.

The corporation certifies that:

_____ It is current in Unemployment Insurance taxes, Payday and Child Labor law monetary obligations, and Proprietary School fees and assessments payable to the State of Texas.

_____ It has no outstanding Unemployment Insurance overpayment balance payable to the State of Texas.

Name and Title of Authorized Representative

Signature

ATTACHMENT E

Coastal Bend Workforce Development Board

DISCLOSURE OF INTEREST

It is the fiscal policy that all persons or firms seeking to do business with Workforce Solutions provide the following information. Every question must be answered. If the question is not applicable, answer with "NA".

FIRM NAME: _____

P.O.BOX: _____

STREET: _____

CITY: _____ STATE: _____ ZIP: _____

FIRM IS:

- 1. Corporation
- 2. Partnership
- 3. Sole Owner
- 4. Association
- 5. Other _____

DISCLOSURE QUESTIONS

If additional space is necessary, please use the reverse side of this page or attach separate sheet.

- 1. State the name of each "non-managerial employee" of Workforce Solutions having an "ownership interest" constituting 5% or more or the ownership in the above named "firm" or who is an officer, director, employee, or consultant employed or associated with your organization:

Name

Job Title and Section (if known)

2. State the names of each “managerial employee” of Workforce Solutions having an “ownership interest” constituting 5% or more of the ownership in the above named “firm” or who is an officer, director, employee, or consultant employed or associated with your organization:

Name	Title
_____	_____
_____	_____

3. State the names of each “board member” of Workforce Solutions having an “ownership interest” constituting 5% or more of the ownership in the above named “firm” or who is an officer, director, employee, or consultant employed or associated with your organization:

Name	Board, Commission, or Committee
_____	_____
_____	_____

4. State the names of each employee or officer of a “consultant” of Workforce Solutions who worked on any matter related to the subject of this contract and has an “ownership interest” constituting 5% or more of the ownership in the above named “firm” or is an officer, director, employee, or consultant employed or associated with your organization:

Name	Consultant
_____	_____
_____	_____

CERTIFICATE

I certify that all information provided is true and correct as of the date of this statement, that I have not knowingly withheld disclosure of any information request; and that supplemental statement will be promptly submitted to Workforce Solutions, as changes occur.

Certifying Person: _____

Title: _____

Signature of Certifying Person: _____

Date: _____

ATTACHMENT F

Coastal Bend Workforce Development Board

UNDOCUMENTED WORKER CERTIFICATION

Effective September 1, 2007, HB 1196 amended Subtitle F, Title 10, of the Texas Government Code to add Subsection 2264. Chapter 2264 directs public agencies, state or local taxing jurisdictions, and economic development corporations (public entities) to require that any business submitting an application to receive public subsidies include in the application a statement certifying that the business, or branch, division or department of the business does not and will not knowingly employ an undocumented worker.

In the event that a business grantee is found in violation of 8U.S.C. subsection 1324a(f), consistent with the requirements of Texas Government Code subsection 2264, Boards are permitted to bring a civil action to recover any amounts owed, as well as court costs and reasonable attorney's fees.

Penalties incurred by business grantees shall be assessed damages at a rate of 20% of contract award. Said damages shall be made payable to the Board within 120 days of receiving the notice of violation.

DEFINITION OF TERMS

Public Subsidy – is broadly defined Texas Government Code §2264.001 (3) as a public program or public benefit or assistance of any type that is designed to stimulate the economic development of a corporation, industry, or sector of the state's economy or to create or retain jobs in Texas. The term includes, among other things, bonds, grants, loans, loan guarantees, benefits relating to an enterprise or empowerment zone, infrastructure development and improvements designed to principally benefit a single business or defined group of businesses, and matching funds. The Commission's Office of General Counsel has found that HB 1196 does not apply to the acquisition of goods and services.

Undocumented Worker – is defined as an individual who, at the time of employment, is not lawfully admitted for permanent residence in the United States, or is not authorized under law to be employed in that manner in the United States.

CERTIFICATION

Contractor certifies that no undocumented workers will be employed during the execution of this contract. By the signature indicated below, the contractor verifies their understanding of the terms and conditions of this requirement.

Signature of Certifying Person

Date

ATTACHMENT G

CUSTOMER RIGHTS AND COMPLAINT RESOLUTION PROCEDURE WORKFORCE SOLUTIONS OF THE COASTAL BEND

Participating in workforce services administered by the Texas Workforce Commission (Commission) or Workforce Solutions of the Coastal Bend (Board) grants you the right to file a complaint regarding your workforce services. These rights are guaranteed through the Commission's complaints, hearings and appeals procedures* at 40 TAC, Chapter 823.

Please be aware that this complaint process does not pertain to matters alleging violations of nondiscrimination or equal opportunity requirements under the Workforce Innovations and Opportunity Act (WIOA) or matters governing job service related complaints.

THE COMPLAINT PROCESS

What is a complaint?

A complaint is a written statement alleging a violation of any law, regulation, or rule relating to any federal- or state-funded workforce service. If you have received an adverse action or want to file a formal complaint about workforce services you are first encouraged to discuss the adverse action or complaint with Texas Workforce Center staff where the complaint originated.

Who may file a complaint?

Texas Workforce Center customers – Individuals who have applied for or are eligible to receive federal- or state-funded workforce funded services administered by the Commission or the Board. These services include:

- Child Care Services
- Temporary Assistance for Needy Families (TANF) / CHOICES
- Supplemental Nutrition Assistance Program (SNAP) Employment & Training
- Workforce Innovations and Opportunity Act (WIOA) - Adult, Dislocated Worker, and Youth
- Eligible Training Providers receiving WIOA funds or other funds for training services.
- Other interested parties affected by the Texas workforce system, including subrecipients. These individuals may be child care or other service providers that have received a written statement issued by the Board, a Texas Workforce Center, or the Agency relating to an adverse action, or a provider or contractor, related to denial or termination of eligibility, under programs administered by the Agency or the Board.
- Previously employed individuals who believe they have been displaced by a Texas Workforce Center customer participating in work-based services such as subsidized employment, work experience, or workfare.

How do I file a complaint?

- Complaints must be in writing using the attached complaint form.
- Complaints must be filed within 180 days of the alleged violation.
- Complaints should be filed at the service level where the complaint originated for optimal and immediate satisfaction.

- If you are not satisfied with the outcome of the informal resolution, you have the right to file a complaint and to have the opportunity for a Board hearing with:

**Workforce Solutions of the Coastal Bend
520 N. Staples
Corpus Christi, Texas 78401**

- Once a complaint is filed with the Board, you will be notified in writing of a Board hearing at least (10) ten calendar days prior to the hearing date. The ten-day notice may be shortened with prior written consent of the parties involved.
- A Board decision will be issued within 60 calendar days from the date the complaint is originally filed.

If you do not agree with the decision issued by the Board or if no decision is mailed within 60 calendar days from the date the complaint was originally filed, you may file a written appeal to the Commission. The appeal must be sent within 14 calendar days after the mailing date of the Board's decision or 90 calendar days after the original filing date of the complaint. Appeals to the Commission are mailed to:

**Appeals, Texas Workforce Commission
101 East 15th St., Room 410
Austin, Texas 78778-0001**

By my signature below, I certify I have received a copy of the Workforce Customer Rights and Complaint Resolution Procedure.

Name of Authorized Representative

Date

ATTACHMENT H

REFERENCES FORM

Failure to provide and include the following information with your response by the submission date of the bid may result in disqualification from further consideration for an award resulting from this solicitation. Each reference will be contacted for evaluation purposes. Any reference that does not respond in a timely manner will result in a score of zero.

REFERENCE #1:

Company Name	
Contact Name	
Address, City, State, Zip	
Phone Number	
Fax Number	
E-Mail Address	
Types of Services Provided	
Contract Term (how many years provided services (To/From) Dates	

REFERENCE #2:

Company Name	
Contact Name	
Address, City, State, Zip	
Phone Number	
Fax Number	
E-Mail Address	
Types of Services Provided	
Contract Term (how many years provided services((To/From) Dates	

REFERENCE #3:

Company Name	
Contact Name	
Address, City, State, Zip	
Phone Number	
Fax Number	
E-Mail Address	
Types of Services Provided	
Contract Term (how many years provided services) (To/From) Dates	