



REQUEST FOR PROPOSALS

FOR

Electronic Document Management System

For the

Workforce Solutions Brazos Valley Board Area

Brazos, Burleson, Grimes, Leon, Madison, Robertson, and Washington

Counties

Issued by

Workforce Solutions Brazos Valley Board

P.O. Box 4128

Bryan, Texas 77805

(979) 595-2800

<http://www.bvjobs.org/>

Issue Date: May 2, 2013

Bidders Conference Call 10:00 AM May 10, 2013

Proposal Due Date: May 30, 2013 by 4:00PM CST

Workforce Solutions Brazos Valley is an equal opportunity employer and provides equal opportunity employment programs and services. Auxiliary aids are available upon request to disabled individuals.
Relay Texas (800) 735-2989 TDD (800) 735-2988 TYY (979) 595-2819

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1. Introduction

Title

This Request for Proposal is for implementation of an Electronic Document Management System for programs operated by Workforce Solutions Brazos Valley and its contractors.

Purpose

The Workforce Solutions Brazos Valley (WSBV) Board is seeking proposals that will address the following goals:

- Eliminate paper document filing;
- Provide turn-key software and hardware solution to migrate from the current paper based filing system to a more diverse paperless document management system;
- Provide staff with easy to use solution to input, store, access, route and retrieve documents;
- Allow for recognition of specific field values in external applications for use in “on-the-fly” retrieval of stored documents;
- Provide electronic signature input and retrieval;

The contract resulting from this procurement is for one year with the option of renewing up to four years pending performance and funds availability.

Background

Workforce Solutions Brazos Valley Board through its fiscal and administrative agent, Brazos Valley Council of Government (BVCOG) oversees the delivery of workforce services for the Brazos Valley which includes the counties of Brazos, Burleson, Grimes, Leon, Madison, Robertson and Washington.

In the day-to-day delivery of services, paper based documents, forms and reports are utilized. This paper documentation is maintained in two filing rooms that are designated for storage. Every participating customer has a separate file that can contain multiple forms and copies of documentation obtained for the purpose of program eligibility and other requirements.

Customer information is entered into Windows based case management and job search / job matching applications. We use The Workforce Information System of Texas application (which is based on Sybase PowerBuilder database platform) to manage workforce customer information and CCSD - Child Care Services Delivery application (based on Microsoft SQL database platform) to manage our child care customer and provider information. In addition, job seeker and employer information is managed in our web based job search / job matching system called WorkInTexas.com.

2. Minimum Software and Hardware Requirements

Electronic Data Management System Software Criteria

- A. Capacity to allow access for up to 40 concurrent users.
- B. Paper and electronic document capture capabilities with Optical Character Recognition / Intelligent Character Recognition.
- C. Capture, stores and retrieves signatures.
- D. Provides manual or computer-assisted indexing interface.
- E. Simple client or web based retrieval of documents.
- F. Includes interface to enable document search and retrieval by reading defined field such as Social Security Number or Case Number information within The Workforce Information System of Texas (TWIST), Child Care Service Delivery system, WorkInTexas applications and other external applications.
- G. Provides document sorting and image routing (workflow) tools.
- H. Provides document security management via user rights and security groups.
- I. Provides document audit trails.
- I. Allows instantaneous distribution of documents via fax, messaging or printer.
- J. Integrates with Microsoft Office 2000, XP, 2003 & 2007 desktop productivity applications.
- K. Integrates with Adobe Acrobat version 7 or later.

L. Compatible with Microsoft Windows XP, Vista and Windows 7.

M. Option to add additional licenses (if software is license based) or modules.

Electronic Data Management System Hardware

- 35 desktop scanners with 600 DPI 24-bit color scanning, 50-sheets automatic document feeder and up to 20 pages per minute scanning speed, 8.5” x 14” document size and duplex scanning capability.
- 1 high speed color scanner with 600 DPI 24-bit color scanning, 50 pages per minute scanning speed, 100-sheet automatic document feeder and up to 11” x 17” document size and duplex scanning capability.
- 30 electronic signature capture devices with minimum touchpad resolution of 100 counts per inch.
- All hardware must be compatible with Windows XP, Vista, Windows 7 and provide connectivity via USB port.

3. Proposal Process

Evaluation Criteria

The evaluation criteria and the point values for scoring are provided below:

Software capability, functionality, features and user interface	20 Points
Interfacing with current applications	15 Points
Software and hardware meets or exceeds minimum requirements	15 Points
Pricing – Licensing structures, Discounts	25 Points
Warranty, Maintenance, Updates and Upgrades	15 Points
References and description of Electronic Data Management System projects ..	10 Points
TOTAL	100 Points

Proposal Requirements

Authorized Contact

The authorized contact person for this Request for Proposal is:

Richard Rogers
Board Consultant
Brazos Valley Workforce Development Board
512 963-48945

richard@swtexas.net

Distribution of Request For Proposal Document

This Request for Proposal document will be published in the Texas Register in the Eagle, daily newspaper, and on the Workforce Solutions Brazos Valley website at www.bvjobs.org

Intent to Bid Notice

Potential offerors are asked to communicate their name, mailing address, and e-mail address to the authorized contact person by May 9, 2013. This communication will inform the Agency of the offeror's interest in the Request for Proposal, ensure that all interested offerors are included on the bidder's list, are provided with the bid conference call contact information, and receive the Question & Answer document and any necessary updates to the RFP. This communication may be faxed, e-mailed, or sent hard copy to the authorized contact person: Richard Rogers, richard@swtexas.net, mailing address: P.O. Box 1296, Utopia, Texas 78884, fax: 830 966-5566.

Proposal Questions and Answers

All questions regarding this proposal must be submitted in writing only by mail, fax or email to the authorized contact: Richard Rogers. No questions will be accepted after May 10, 2013.

Question & Answer document will be available through the Workforce Solutions Brazos Valley Board website at www.bvjobs.org no later than May 15, 2013

Other Communication

Communication with any WSBVB/BVCOG personnel in reference to or concerning this Request for Proposal, other than the authorized contact person listed in these instructions, is prohibited. Failure to follow this provision may be grounds for disqualification of the proposal.

Bid Conference Call

A bidders' conference call will be held on May 10, 2013 at 10:00AM. Potential bidders who have submitted an intent to bid notice will be provided with the call information on May 9th by email.

Proposal Due Date and Delivery Method

The authorized contact person must receive proposals **no later than 4:00 p.m. May 30, 2013, Central Daylight Saving Time.**

Any reasonable delivery method, except fax and e-mail, may be used. While not required, applicants are encouraged to use a traceable delivery method, such as certified mail, return receipt requested, or a guaranteed express delivery service. Proposals should be submitted to:

Richard Rogers
Board Consultant
Workforce Solutions Brazos Valley
3991 E. 29th Street
Bryan, Texas 77802

Or mailed to:

Richard Rogers
Board Consultant
Workforce Solutions Brazos Valley
P.O. Drawer 4128
Bryan, Texas 77805-4128

Proposal Content

Offeror must include following information in the narrative and accompanying budget when responding to this Request for Proposal:

- Information about company and its expertise in Electronic Data Management System.
- Three contact references and brief description of Electronic Data Management System implementations.
- Detailed narrative of software capability, functionality and best uses.
- Detailed description of each software component/module needed to meet or exceed minimum Electronic Data Management System software requirements as specified in section 2.
- Cost per each software component/module/license needed to meet or exceed minimum Electronic Data Management System software requirements as specified in section 2.
- Cost of 35 desktop scanners that meet or exceed minimum hardware specifications.
- Cost of 1 high speed scanner that meets or exceeds minimum hardware specification.

- Cost of 30 electronic signature capture devices that meet or exceed minimum hardware specification.
- Cost of on-site software and hardware installation.
- Estimated date of delivery, project start date and time needed to complete all hardware and software installations.
- Estimated length of installation per server and workstations.
- Description and estimated length of System Administrator training.
- Cost of System Administrator training.
- Description and estimated length of end user training.
- Cost of end user training.
- Cost of first year of software maintenance if not included in the initial software cost.
- Description of maintenance options / technical support (what is covered)
- Annual renewal cost of maintenance agreement.
- Cost of additional user licenses, if applicable.
- List any additional items and costs associated with the implementation of Electronic Data Management System.

Proposal Format

- Interested parties must respond to this Request for Proposal by completing the forms in Proposal Packet and following proposal content requirements.
- The proposal submitted in response to the Request for Proposal must be on 8 1/2" by 11" paper, reproduced or printed on one side only, and in a portrait orientation. The type must be in Times New Roman, font size 12.
- One (1) original and six (6) complete, loose leaf, paper copies of the proposal and required attachments must be submitted. Do not use any type of binder.
- A proposal submitted under this Request for Proposal must include the original signature of an authorized representative.
- Do not submit materials not specifically requested, as they will not be reviewed.

Proposal Conditions

Workforce Solutions Brazos Valley is exempt by law from payment of Texas Sales Tax and Federal Excise Tax.

This RFP does not commit Workforce Solutions Brazos Valley/BVCOG or its subcontractors to pay for any cost incurred prior to the execution of any contract. All contracts are contingent upon availability of funds from the U.S. Department of Labor and/or Texas Workforce Commission.

The intent of this RFP is to identify the various contract alternatives and estimates of costs for the services (or products) that are being solicited. Workforce Solutions Brazos Valley/BVCOG is under no legal requirement to execute a contract from any proposal submitted.

Proposers shall not make contact with, or make offers of gratuities or favors, to any officer, employee, or member of WSBVB/BVCOG or Subcontractors. Violation of this instruction will result in immediate rejection of the proposal.

Workforce Solutions Brazos Valley specifically reserves the right to vary the provisions set herein any time prior to the execution of the contract where such variance is deemed to be in the best interest of Workforce Solutions Brazos Valley.

All proposals and their accompanying attachments will become the property of Workforce Solutions Brazos Valley after submission and materials will not be returned.

The contents of a successful proposal may become contractual obligations, if a contract is awarded. Failure of the proposer to accept those obligations may result in the elimination of the proposal from the selection process. The contents and requirements of this RFP may be incorporated into any legally binding and duly negotiated contract between Workforce Solutions Brazos Valley and the selected subcontractor.

Workforce Solutions Brazos Valley will make payments within 30 days of receipt of accurate invoice with support documentation of allowable costs from vendor.

WSBVB reserves the right to cancel the contract if the contractor fails to perform as agreed, or for convenience if it is in the best interest of WSBVB with written 30 day notice.

This is a negotiated procurement utilizing the Request for Proposal method, and as such, award does not have to be made to the respondent submitting the lowest priced offer, but rather to the respondent submitting the most responsive proposal that satisfies WSBVB's requirements.

WSBVB will request selected proposer(s) to participate in contract negotiations at the WSBVB office at 3991 East 29th Street, Bryan Texas.

Any business, or any branch, division, or department of that business, engaged with the Board in a contract for services that involves a public subsidy will not knowingly employ an undocumented worker. If a contractor doing business with the Board is convicted of a violation under 8 USC S.1324a (unlawful employment of undocumented workers) that business shall repay the amount of the public subsidy with interest not later than the 12th day after the business is notified of the violation. The interest rate applied to the repayment is 15%.

Open Records Act

Without regard to any designation made by the person or entity making a submission, Brazos Valley Workforce Development Board considers all information submitted in response to this Request for Proposal, which is not marked Confidential, to be public record that may be disclosed upon request pursuant to the Texas Open Records Act. The Office of Attorney General will be the final determiner on whether information marked confidential is protected from release.

Withdrawal of Proposals

A proposal may be withdrawn at any time prior to the selection announcement date by writing to the authorized contact person. A withdrawn proposal will not be considered for award but will be retained by Brazos Valley Workforce Development Board according to the Proposal Information Confidentiality provisions of this Request For Proposal.

Amendment of Proposals

Proposals may not be amended in writing at any time after submission. Any material submitted after the deadline will not be considered.

Proposal Evaluation

All proposals received will be reviewed for responsiveness to the RFP. For a proposal to be considered responsive and to be evaluated for selection, the following requirements must be met:

- The proposal must be submitted by the due date.
- The proposal must be submitted in the format prescribed, such as font type and size, with information inclusion and content as specified in this RFP.
- The proposal must include original signatures as specified.
- The proposal must include the specific information solicited by the Request for Proposal.

Best and Final Offer

The Brazos Valley Workforce Development Board reserves the right to negotiate with and/or to request "Best and Final Offers" from any or all offerors as a part of the formal evaluation process. This will allow Brazos Valley Workforce Development Board to resolve questions and concerns it may have about the offerors' proposals. If the Brazos Valley Workforce Development Board requests

a formal, written Best and Final Offer, the offeror will be notified of the time period to respond to the request. If an offeror does not respond to the request within the time period, the Brazos Valley Workforce Development Board will consider the most recent offer to be the “Best and Final Offer”.

Selection and Award Announcement

The Independent Proposal Review Team will evaluate proposals, including any Best and Final Offer responses received and conduct any fact-finding considered necessary including any requests for on-site demonstration. The Team will make a recommendation to the Brazos Valley Workforce Development Board who will make the selection for contract negotiations.

Protests/Appeals

Any offeror submitting a proposal and wishing to protest the award must submit the following information by certified mail to:

Tom Wilkinson, Executive Director
3991 East 29th Street
Bryan, Texas 77802

The written protest, including relevant written information, must be received by the Agency within ten (10) business days from the date of the announcement of the award. The written protest must:

- identify the Request For Proposal being protested;
- state the grounds for the protest, including a description of any alleged acts or omissions by the entity that forms the basis for the protest;
- provide any written information that the protestor believes is relevant to the grant award; and
- provide the basis for the protestor's interest in the award.