

REQUEST FOR QUOTE

For

Software Maintenance for Docubase Electronic Document Management System

For the

WORKFORCE SOLUTIONS BRAZOS VALLEY BOARD

P.O. Drawer 4128

Bryan, Texas 77805

(979) 595-2800

ISSUE DATE: September 13, 2017

BIDDERS CONFERENCE CALL: September 19, 2017 at 10:00 AM CST

RESPONSE DEADLINE: 4:00 PM CST October 13, 2017

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**Workforce Solutions Brazos Valley Board
Request for Quotes
for
Docubase Electronic Document Management System Maintenance**

INTRODUCTION

The Workforce Solutions Brazos Valley Board (WSBVB) is one of the 28 workforce boards established by the Texas Legislature in 1996. The Board is a volunteer body appointed by the Chief Elected Officials of each of the seven counties in the Brazos Valley, in accordance with the Workforce Investment Act and the Texas Workforce Legislation. WSBVB is responsible for the strategic and operational planning, oversight and evaluation of federal and state workforce programs within Brazos, Burlison, Grimes, Leon, Madison, Robertson and Washington counties including employment, training funds, child care and related support services. WSBVB oversees the operation for one full-service and six satellite career centers in the Region. All centers provide employment and training information, customer service and referral assistance for the current emerging workforce. The Brazos Valley Council of Government (BVCOG) is the fiscal and administrative agent for Workforce Solutions Brazos Valley.

REQUESTED SERVICES

The Workforce Solutions Brazos Valley Board (the Board) is seeking maintenance for their existing Docubase electronic document management system. Successful vendor must be a certified Docubase provider. The existing system consists of the following:

Docubase Software Products and Services include the following:

Docubase Information Suite Single Server, fifty (50) concurrent user licenses

Document Manager (VEGA)

Report Capture (TITAN)

Content Manager (RHEA)

Business Processing (TELESTO)

FormPro (Calypso)

PDF Archive Manager (Print to Server)

Virtual Print Manager (Print to Docubase)

DB-Form

DB-Link

ComServer

DataXchange

DBS Live Forms

Single Server, ten (10) concurrent users License

Development Server License

Docubase Connector.

Management of electronic signature, provision of printers, signature pads, moving cases for monitoring and reconfiguring workflow

Software features include the following:

Docubase Administration: adding, deleting, modifying user accounts, departmental bases, workflow processes, and report capture.

DBS Live Forms Administration: adding, deleting, modifying user accounts and departmental tenants.

Docubase Calypso, Form Template Creation/Modification, per template (Five (5) standard forms provided with ASM)

DBS Live Forms, Form/Flow Creation/Modification, per form/flow (Five (5) standard form/flow applications provided with ASM)

Advanced Template or Form/Flow construction/Modification

Hardware issues will be addressed by the Brazos Valley Council of Governments IT Department. Maintenance will include user training, if necessary.

Maintenance services may include, but not be limited to the support, development, and maintenance of the present system.

The system is located at the Center for Regional Services Workforce Solutions Center, 3991 East 29th Street, Bryan, Texas 77802.

Services will include all software updates; unlimited phone and remote access support to any and all software related issues, and provide remote administrative management of the server or client stations as required. The unlimited support must be available to any system user and cover all purchased software modules.

PERFORMANCE PERIOD

The anticipated contract period is **November 1, 2017 through September 30, 2018**. This is a cost reimbursement contract. The Board has the option to renew this contract for three additional contract periods contingent upon successful contract completion and the availability of funds.

RFQ AVAILABILITY

RFQ packages may be obtained from the Board's web page www.bvjobs.org or by contacting Barbara Clemmons, Program Specialist at Barbara.Clemmons@bvcog.org or 979 595-2801 ext. 2061.

CONTACT PERSON

Barbara Clemmons has been designated as the contact person for this request for quote. All questions regarding this RFQ should be directed to Barbara Clemmons at Barbara.Clemmons@bvcog.org.

REQUEST FOR QUOTE PROCESS

Timeline

- | | |
|---|------------------------------------|
| • Release of RFQ | September 13, 2017 |
| • Deadline for Submission of Questions
Bidder's Conference | September 18, 2017, 4:00 PM CST |
| • Bidder's Telephone Conference | September 19, 2017 at 10:00 AM CST |
| • Questions and Answers Posted | September 22, 2017 |
| • Deadline for Proposals | October 13, 2017 by 4:00 PM CST |
| • Review of Proposals | October 16-20, 2017 |
| • Notification of Respondents | October 26-30, 2017 |
| • Contractor start date | November 1, 2017 |

Bidder's Telephone Conference

A Bidder's Conference will be held through a telephone conference call on September 19, 2017 at 10:00 AM CST. The call-in number is 979-595-2802. To view and download the RFQ go to www.bvjobs.org. Questions concerning this procurement must be submitted via email to Barbara.Clemmons@bvjobs.org no later than 4:00 pm on September 18, 2017. A question and answer document will be prepared and posted on www.bvjobs.org no later than September 22, 2017. Questions concerning this procurement will not be accepted outside of the above timeframe.

Evaluation Criteria

Responses received from this solicitation will be evaluated based on the following evaluation criteria.

Knowledge of Docubase Software	50 points
Demonstrated Performance/Experience	25 points
Reasonableness of Cost	25 points
HUB Status	5 points

Respondent's Qualifications

Qualified respondents must possess the following qualities/abilities:

- Experience and knowledge of Docubase software as used at the Workforce Solutions Center.
- Experience in working with electronic document management system software.
- Analytical skills to review, analyze, and interpret system problems and;
- Ability to produce and maintain supportive documentation.
- Experience and history of transitioning electronic document management systems into their processes.
- Qualified staff who will be responsible for providing support within an acceptable response time to keep the system operational.

SUBMISSION INSTRUCTIONS

Interested parties must respond to this RFQ using the appropriate format. Respondents must submit the following with their response:

1. Completed Cover Page

2. Signed certification forms
3. Current resume(s)
4. Professional references
5. Quote Narrative
6. Hourly rate and/or rate per service/equipment

Respondents should address each of the quote narrative elements; provide a cost rate per hour and per service/equipment. Respondents should submit the names and contact information of three professional references.

- All RFQ responses must be typed on 8½” by 11” paper in no less than a 12-point font and reproduced or printed on one side only. One original plus four complete copies of the RFQ must be submitted. Only use paper clips or binder clips, no staples or binders.
- All RFQ responses must be received by **4pm CST October 13, 2017** at the Center for Regional Services, 3991 East 29th Street, Bryan, Texas 77802. RFQ responses received after this date and time will be considered non-responsive and will not be reviewed. No faxed or email responses will be considered or reviewed.
- All responses to this RFQ must be complete with all the required items or it will be deemed non-responsive and not reviewed.
- All documents requiring a signature must be signed and included with the other quote documents.
- All questions pertaining to the Request for Quote can be sent electronically to Barbara Clemmons at barbara.clemmons@bvcog.org no later than September 18, 2017, 4:00 PM CST.
- Faxed responses will not be accepted, will be considered non-responsive and will not be reviewed.
- RFQ responses may be withdrawn at any time prior to the due date by notifying the Board’s contact person in writing. A response may be modified prior to the due date by submitting an amended RFQ response to the contact person before the due date and time.
- This Request for Quote does not commit the Board to award a contract, to pay any cost incurred in the preparation of a response to this request, or to procure for services or supplies.
- The Board reserves the right to accept or reject any or all responses from this request and to negotiate with all qualified sources if it is in the best interest of the Board to do so.

REQUEST FOR QUOTE NARRATIVE INSTRUCTIONS

1. Briefly describe your business or organization history. Detail your experience transitioning an existing system into your processes.
2. Propose how your business or organization would complete the transition into management of the current Workforce Solutions Docubase System.
3. Describe how you would ensure protection of confidential information.
4. Identify the individual or individuals who will be conducting the requested services and describe their educational background and experience.
5. Thoroughly describe your experience providing each of the requested services identified in REQUESTED SERVICES section of this RFQ. For any consultant work include the organization or agency for whom the work was conducted and when.

6. Provide your proposed approach to providing each of the requested services to the Workforce Solutions Brazos Valley Board.
7. Include your proposed hourly rate for the provision of the requested and/or rate for each task to take over, maintain and continue development of Workforce Solutions' current electronic document management system.

REQUEST FOR QUOTE CONDITIONS AND LIMITATIONS

1. The response to this Request for Quote (RFQ) does not commit the Board to pay any costs incurred in the preparation of such response.
2. The Board reserves the right to accept or reject any or all Quotes received, to cancel this RFQ in part or in its entirety and to reissue this RFQ.
3. The Board may award the contract for any items/services or group of items/services in the RFQ and increase or decrease the quantity in the RFQ, unless otherwise specified in the quote.
4. The Board reserves the right to hold and select any quote that has been submitted in compliance with the previously stated deadline for a period of sixty (60) days after the response deadline.
5. The Board reserves the right to negotiate the final terms of all agreements with respondents selected. Any agreements negotiated because of this RFQ may be re-negotiated and/or amended to meet the needs of the Brazos Valley Workforce Development Area.
6. The Board reserves the right to waive any defect in this procurement process or to make changes to this solicitation, as it deems necessary. The Board will provide notifications of such changes to all respondents recorded in the official record (Distribution Log/Receipts Record) as having received or requested an RFQ.
7. The Board reserves the right to contact any individual, agencies or employers listed in the quote; to contact others who may have experience and/or knowledge of the respondent's relevant performance and/or qualifications; and to request additional information from respondents.
8. The Board reserves the right to withdraw or reduce the amount of an award, or to cancel any contract resulting from this procurement if adequate funding is not received from the Texas Workforce Commission.
9. Respondents shall not, under penalty of law, offer or provide any gratuities, favors or anything of monetary value to any officer, member, employee or agent of the Board for the purpose of or having the effect of influencing favorable disposition toward their own quote or any other quote submitted hereunder.
10. No employee, officer or agent of the Board shall participate in the selection, award or administration of a contract supported by federal or state funds if a conflict of interest, real or apparent, would be involved.
11. Respondents shall not engage in any activity that will restrict or eliminate competition. Violation of this provision may cause a Respondent's quote to be rejected. This does not preclude joint ventures or subcontracts.
12. All responses submitted must be an original work product of the respondent. The copying, paraphrasing or other use of substantial portions of the work product of others and submitted hereunder, as original work of the respondent is not permitted. Failure to adhere to this instruction may cause the quote(s) to be rejected.
13. The only purpose of this RFQ is to ensure uniform information in the selection of the Quote for the procurement of services. This RFQ is not to be construed as a purchase agreement or contract, or as a commitment of any kind, nor does it commit the Board to pay for costs incurred prior to

the execution of a formal contract unless such costs are specifically authorized in writing by the Board.

14. The contents of a successful quote may become a contractual obligation, if selected for award of a contract. Failure of the respondent to accept this obligation may result in the cancellation of the award. No plea of error or mistake shall be available to successful respondent(s) as a basis for release of proposed services at stated price/cost. Any damages accruing to the Board because of the respondent's failure to contract may be recovered from the respondent.
15. A contract with the selected provider may be withheld at the Board's sole discretion if issues of contract compliance or questioned/disallowed costs exist, until such issues are satisfactorily resolved. The Board may withdraw award of contract.
16. The Board is the responsible authority for handling complaints or protests regarding the quote selection process. This includes, but is not limited to, disputes, claims, protests of award, source evaluation, or other matters of a contractual nature. Matters concerning violation of law shall be referred to such authority, as may have proper jurisdiction.
17. All respondents will be notified in writing of the results of this RFQ. Any protest regarding this process must be filed with the Board by contacting:

Patricia Buck
Workforce Solutions Brazos Valley Board
P.O. Box 4128
Bryan, TX 77805
979 595-2800
patricia.buck@bvcog.org

18. Solicitation and selection through this RFQ must conform to relevant State and Federal laws and regulations and local policies governing the procurement of supplies, equipment and services. Respondents are responsible for familiarizing themselves with these laws and regulations.
19. All quotes and their accompanying attachments become the property of the Board upon submission. Materials submitted will not be returned. All quotes are subject to the Texas Open Records Act.
20. This is a negotiated procurement utilizing the Request for Quote method and as such, award may not be made to the respondent submitting the lowest price quote, but rather the respondent submitting the most responsive quote satisfying the Board's requirements.

**Workforce Solutions Brazos Valley Board
Software Maintenance Request for Quote
Cover Sheet**

All items of the RFQ Cover Sheet must be completed and become the first sheet of the quote to be returned to WSBVB. Identify a liaison or primary contact person, as well as the Signatory Authority (a person with the legal authority to negotiate and sign a contract on behalf of the proposing organization and who is also the person who must sign the various certification forms). **Historically Underutilized Businesses (HUB's) must indicate the HUB certification number and the certifying agency on the cover sheet and attach a copy of the certificate to the quote.**

Name of Individual/Business/Organization: _____

Mailing Address: _____

City, State, Zip Code: _____

Physical Address (If Different): _____

City, State, Zip Code: _____

Contact Person: _____

Title: _____

Telephone Number :(_____) _____

E-mail Address: _____

Contract Signatory Authority: _____

Signature **Date**

Printed/Typed Name

General Information

Tax/Legal Status of Business:

Corporation Sole Proprietorship Partnership
 Public Not for Profit Other _____

Date business established: _____

State Controller ID Number (If available): _____

Federal Taxpayer ID Number or SSN: _____

Is respondent certified as a historically underutilized business? Yes No (If yes, a copy of the certification notice is required as an attachment.) Certifying Agency: _____

WORKFORCE SOLUTIONS BRAZOS VALLEY
Software Maintenance Request for Quote
CERTIFICATION OF BIDDER

I hereby certify that the information contained in this quote and any attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. I certify that no employee, board member, or agent of the Workforce Solutions of the Brazos Valley has assisted in the preparation of this quote. I acknowledge that I have read and understood the requirements and provisions of the RFP and that this organization will comply with the procurement standards applicable under this RFP, and any other applicable local, state, and federal regulations and policies. I also certify that I have read and understand the "Governing Provisions and Limitations" section presented in this RFP and will comply with the terms, thereof, and that the WSBVB is authorized to verify references and stated performance data. Furthermore, that:

I, _____ am the _____ of the corporation, partnership, association, public agency or other entity named as Bidder and Respondent herein and that I am legally authorized to sign this quote and submit it to the Workforce Solutions of the Brazos Valley on behalf of said organization by authority of its governing body.

ATTEST

Respondent Signature

Printed/Typed Name

Date

Name of Business Submitting Quote

WORKFORCE SOLUTIONS BRAZOS VALLEY BOARD
Software Maintenance Request for Quote
CERTIFICATION REGARDING DEBARMENT

Applicants should refer to the regulations cited below to determine the certification to which they are required to attest. Applicants should also review instructions for certification included in the regulations before completing this form. Signature of this form provides for compliance with certification requirements under 34 CFR Part 85, "Government-wide Debarment and Suspension (Non-procurement and Government-wide Requirements for Drug-Free Workplace (Grants))." The certifications shall be treated as a material representation of fact upon which reliance will be placed when the Workforce Solutions Brazos Valley Board determines to award the covered transaction, grant, or cooperative agreement.

As required by Executive Order 12549, Debarment and Suspension, and implemented at 34 CFR Part 85, for prospective participants in primary covered transactions, as defined at 34 CFR Part 85, Sections 85.105 and 85.110. The applicant certifies that it and its principals:

- (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
- (b) Have not within a three-year period preceding this application 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;
- (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (1) (b) of certification; and
- (d) Have not within a three-year period preceding this application had one or more public transactions (Federal, State, or local) terminated for cause or default; and
- (e) Where the applicant is unable to certify to any of the statements of this certification, he or she shall attach an explanation to this application.

Signature of Authorized Representative and Date

Printed/Typed Name

Name of Business Submitting Quote

WORKFORCE SOLUTIONS BRAZOS VALLEY BOARD
Software Maintenance Request for Quote
CERTIFICATION REGARDING LOBBYING

Applicants should refer to the regulations cited below to determine the certification to which they are required to attest. Applicants should also review instructions for certification included in the regulations before completing this form. Signature of this form provides for compliance with certification requirements under 34 CFR Part 85, "Government-wide Debarment and Suspension (Non-procurement and Government-wide Requirements for Drug-Free Workplace (Grants)." The certifications shall be treated as a material representation of fact upon which reliance will be placed when Workforce Solutions of the Brazos Valley determines to award the covered transaction, grant, or cooperative agreement.

As required by Section 1352, Title 31 of the U.S. Code, and implemented at 34 CFR Part 82, for persons entering into a grant or cooperative agreement over \$100,000, as defined at 34 CFR Part 82, Section 82.105 and 82.110, the applicant certifies that:

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 any agency, a member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the making of any Federal grant, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal grant or cooperative agreement.;

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, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions;

The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all times (including sub-grants, contracts under grants and cooperative agreements, and subcontracts) and that all Sub-recipients shall certify and disclose accordingly.

Signature of Authorized Representative and Date

Printed/Typed Name

Name of Business Submitting Quote

WORKFORCE SOLUTIONS BRAZOS VALLEY BOARD
Software Maintenance Request for Quote
CERTIFICATION REGARDING DRUG-FREE WORKPLACE

Applicants should refer to the regulations cited below to determine the certification to which they are required to attest. Applicants should also review instructions for certification included in the regulations before completing this form. Signature of this form provides for compliance with certification requirements under 34 CFR Part 85, "Government-wide Debarment and Suspension (Non-procurement and Government-wide Requirements for Drug-Free Workplace (Grants))." The certifications shall be treated as a material representation of fact upon which reliance will be placed when the Workforce Solutions of the Brazos Valley determines to award the covered transaction, grant, or cooperative agreement.

DRUG-FREE WORKPLACE

(GRANTEES OTHER THAN INDIVIDUALS)

As required by the Drug-Free Workplace Act of 1988, and implemented at 34 CFR Part 85, Subpart F, for grantees, as defined at 34 CFR Part 85, Sections 85.605 and 85.610

- A. The applicant certifies that it will or will continue to provide a drug-free workplace by:
 - Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition;
- B. Establishing an on-going drug-free awareness program to inform employees about:
 - (1) The dangers of drug abuse in the workplace;
 - (2) The grantee's policy of maintaining a drug-free workplace;
 - (3) Any available drug counseling, rehabilitation, and employee assistance programs;
 - (4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace; and
 - (5) Making it a requirement that each employee to be engaged in the performance of the contract be given a copy of the statement required by paragraph (A);
- C. Notifying the employee in the statement required by paragraph (A) that, as a condition of employment under the grant, the employee will:
 - (1) Abide by the terms of the statement; and
 - (2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such a conviction;
- D. Notifying the agency, in writing, within 10 calendar days after receiving notice under subparagraph (C)(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position and title to the Executive Director Workforce Solutions Brazos Valley. Notice shall include the identification number(s) of each affected grant.
- E. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph (D)(2), with respect to any employee who is so convicted:

- (1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
 - (2) Requiring such employee(s) to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;
- F. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (A), (B), (C), (D), (E), and (F).
- G. The grantee may insert in the space provided below the site(s) for the performance of work done in connection with the specific grant:
Place of Performance (street address, city, county, state, zip code)

Check here , if there are work places on file that are not identified in this certification.

Signature of Authorized Representative and Date

Printed/Typed Name

Name of Business Submitting Quote

WORKFORCE SOLUTIONS BRAZOS VALLEY BOARD
Software Maintenance Request for Quote
DRUG-FREE WORKPLACE (GRANTEES WHO ARE INDIVIDUALS)

As required by the Drug-Free Workplace Act of 1988, and at 34 CFR Part 85, Sections 86.605 and 85.610:

As a condition of the grant, I certify that I will not engage in the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance in conducting any activity with the grant.

If convicted of a criminal drug offense resulting from a violation occurring during the conduct of any grant activity, I will provide notice of such conviction, in writing, within 10 calendar days of the conviction to the Executive Director, Workforce Solutions Brazos Valley.

Signature of Authorized Representative and Date

Printed/Typed Name

Name of Business Submitting Quote

WORKFORCE SOLUTIONS BRAZOS VALLEY BOARD
Software Maintenance Request for Quote
CERTIFICATION REGARDING CONFLICT OF INTEREST

By signature on this quote, Respondent covenants and affirms that:

1. No manager, employee or paid consultant of the Respondent is a member of the Policy Board, the President, or a Manager of the Workforce Solutions of the Brazos Valley (WSBVB);
2. No manager or paid consultant of the Respondent is a spouse to a member of the Policy Board, the President, or a manager of the WSBVB;
3. No member of the Policy Board, the President or an employee of the WSBVB owns or controls more than 10 percent in the Respondent;
4. No spouse of a member of the Policy Board, President or employee of the WSBVB is a manager, manager or paid consultant of the Respondent;
5. No member of the Policy Board, President, or employee of the WSBVB receives compensation from Respondent for lobbying activities as defined in federal laws or Chapter 305 of the Texas Government Code;
6. Respondent has disclosed within the Quote any interest, fact or circumstance that does or may present a potential conflict of interest;
7. Should respondent fail to abide by the foregoing covenants and affirmations regarding conflict of interest, Respondent shall not be entitled to the recovery of any costs or expenses incurred in relation to any contract with the WSBVB and shall immediately refund to the WSBVB any fees or expenses that may have been paid under the contract and shall further be liable for any other costs incurred or damages sustained by the WSBVB relating to that contract.

Signature of Authorized Representative and Date

Printed/Typed Name

Name of Business Submitting Quote

WORKFORCE SOLUTIONS OF THE BRAZOS VALLEY
Software Maintenance Request for Quote
NON-DISCRIMINATION STATEMENT

The undersigned applicant certifies that it shall comply with the non-discrimination provisions outlined by the U.S. Department of Health and Human Services, WIA, the Rehabilitation Act of 1973, and BVCOG and WSBVB policies.

Signature of Authorized Representative and Date

Printed/Typed Name

Name of Business Submitting Quote