



Regional Housing Authority

Request For Proposals

RFP 2022-10-01

Customer Relations Management (CRM)

Tlingit Haida Regional Housing Authority (THRHA) is requesting proposals from service providers who are qualified and interested in providing a customer relationship management (CRM) cloud based program to empower THRHA to provide convenient, user-friendly access for our clients, tenants, tribal citizens to connect, communicate, apply and collaborate with THRHA.

Submit Proposals to:

Tlingit Haida Regional Housing Authority
Attn: Kenneth Southerland, Director of Administrative Services
5446 Jenkins Drive
Juneau, AK 99801

For questions and registration,
contact Kenneth Southerland
907-780-3126
ksoutherland@thrha.org

Posting Date: June 1, 2022
RFP Proposals Due: June 30, 2022

I. General Information

Tlingit Haida Regional Housing Authority (THRHA) currently operates Salesforce in one program, Low Income Home Energy Assistance Program (LIHEAP). Proposals will be to enhance existing Salesforce application to other programs or to provide a cost effective alternative application.

Responsiveness: To be considered responsive, Offerors must meet the minimum qualifications and possess sufficient resources to ensure streamlined deliverables and schedules are met.

Responsibility: THRHA expects to award to the Offeror whose proposal is responsive, responsible and the most advantageous as determined by THRHA in its sole discretion. In determining responsibility, THRHA reserves the right to request supplementary information to assure prospective contractors have a satisfactory record of performance, are qualified legally to contract with THRHA, and have supplied all necessary information in connection with an inquiry concerning responsibility. Additionally, THRHA reserves the right to require prospective contractors to demonstrate they have the necessary financing, equipment, facilities, expertise, and personnel to perform any areas of the RFP and resulting contract. THRHA reserves the right to request additional supporting documentation in determining responsiveness.

Preference: Indian/Native owned firms and Minority Business Enterprise and Women Business Enterprise firms (MBE/WBE) are encouraged to participate. In accordance with 24 CFR 1000.52 and 1003.510, preference points will be given to Indian owned organizations and economic enterprises as described in Part XI Proposal Timeline and Evaluation. Firms that demonstrate extensive experience with service/need may receive higher points.

To receive a qualifying preference (e.g. MBE/WBE), Offerors must have a valid, current business license and provide evidence to support each preference being requested. Acceptable evidence may consist of any of the following:

- Documentation that verifies the entity is at least 51% Indian Owned and operated; and
- Certification that verifies the entity is MBE / WBE

Proposals that do not provide acceptable supporting evidence will not receive a preference. Offerors must provide their documentation with Attachment G, Preference Questionnaire.

II. Background

Tlingit Haida Regional Housing Authority is a 501(c)(3) nonprofit corporation and is Southeast Alaska's largest provider of affordable housing. Our mission is to connect Southeast Alaskans with sustainable housing opportunities and innovative financial solutions through various applications and programs. Additional information can be found at www.regionalhousingauthority.org

During its more than 40 years as a nonprofit housing authority, THRHA has led and managed hundreds of projects and programs ranging from small awards to large, multi-site programs with state and national significance. To achieve its mission, THRHA partners with federal, state, and other non-profit organizations to implement a diverse array of assistance programs in Southeast Alaska. THRHA is the Tribally Designated Housing Entity for twelve Tribes in Southeast Alaska under the Native American Self Determination Act (NAHASDA). THRHA has nearly 100 employees, providing guidance and support to over 16 communities through more than a dozen applications and programs.

THRHA currently provides a Low Income Home Energy Assistance Program (LIHEAP) which is a federally funded program that helps low income households with the home energy bills. Applicants must apply for the assistance. THRHA currently uses a Salesforce Nonprofit Success Pack (NPSP) instance to manage the Low Income Home Energy Assistance Program and the Low Income Household Water Assistance Program.

We utilize an Experience Cloud community that allows clients to create an account and apply for program benefits each year. We use a series of custom objects to capture client data and our staff use a mixture of screen flows, button launched flows, and process builders to internally create applications, manage approvals, create payment records, and manage vendor and client documentation.

THRHA wants to expand or supplement our existing CRM to work with other programs such as home emergency repair; housing services applications; maintenance requests; home owner assistance program; or emergency rental assistance programs.

Our finance department uses Sage Intacct - we require an integration to process payment records directly from Salesforce or other CRM. All publicly accessible pages must be compliant with Web Content Accessibility Guidelines and Section 504/508 accessibility regulations. You can view the forward facing portal at <https://thrha.force.com/SiteLogin>

THRHA also uses Housing Data Systems (HDS) and HDS Doorways for tenant and housing

management.

Additionally, Haa Yakaawu Financial Corporation (HYFC), a wholly owned subsidiary, provides financial counseling; financial services; mortgages; home renovation loans to help Southeast Alaskans reach goals as home buyers and owners. HYFC uses Downhome Solutions, a cloud based loan servicing.

THRHA uses Office 365 with Outlook, Sharepoint, OneDrive, and other Microsoft products. Website is done through WordPress.

III. Goals, Objectives and Scope of Services

The Offeror will be responsible and able to provide a range of services that includes, but is not limited to:

Our goal is to expand the use of our Salesforce instance to other programs within our organization. We envision an expanded community that allows clients to apply to multiple programs with a single application, or multiple applications that can pull data within the system to avoid duplicate data entry. We envision a portal and application process that is intuitive for our clients and a system that we can maintain without significant developer support.

The CRM will allow us to track, communicate with, draw reports on, and archive client throughout the process.

Development.

Our development partner will be responsible for recommending, designing, implementing, and maintaining the best complimentary CRM products to implement and achieve our goal of having an integrated system with multiple features. The development partner will propose additional applications and/or services that meet and/or exceeds the current needs, while providing for future growth in tracking, reporting, donations, communication, and event management.

Upon completion, the development partner will continue in a role providing scheduled and on-call technical support, maintenance, backup, security checks, and general oversight. As well as, ongoing recommendations for improvements.

The successful CRM will be an invaluable asset to the staff, as well as a benefit to THRHA affiliated programs and organizations. The comprehensive CRM will enable THRHA to be more efficient in managing its constituent profile information, relationship management, correspondence tracking, and reporting, grant management, and donation management.

Strategies

- Data Management: Collect, store, and act on data

Customer Relations Management (CRM)

- Client Management: Identify eligible programs, send requests to client, and interaction tracking
- Member Self-Service Portal: User setups with authentication, online applications, download forms, attach support documents, submit service requests, retrieve prior applications to reapply and update information.
- Marketing Management: Social media, surveys, batch letters/texts/emails, and tracking of advertising of programs.
- Business Reporting: Dashboards, operational reports, and Ad-Hoc reports for specific program requirements with ability to export to excel.
- Workflow Automation: Checklists, task scheduling and tracking, business process tracking and electronic approvals.
- Deployment Environment: Cloud based, ADA compliant, and mobile Support (Smartphone access)
- Security: User specific security and data encryption
- Support: During implementation and include minimum of 9 months from go live date
- Integration of data flow between Salesforce and other software used at THRHA
- Allow for sharing of documentation between programs/applications.
- Training
 - Provide training that coincides with new features as they become available
 - Vendor needs to provide walk-thru training sessions for THRHA and its staff
 - Online Training

The Contractor must have all the necessary equipment, supplies and resources necessary to perform the above.

IV. Prior Experience and Minimum Requirements

In order to be considered responsive, Offerors (firm, personnel, subcontractors and/or joint ventures) must demonstrate that they meet or exceed the following minimum requirements.

Offerors must provide sufficient, detailed information that demonstrates:

- Have demonstrated proficiency, experience, and creativity as a developer and programmer for CRM for multi-faceted non-profits.
- Present a through comprehensive action-based plan and strategy that clearly outlines roles and responsibilities for each stakeholder, THRHA, and contractors, so that further developing and deploying this CRM is successful.
- Present a plan for enhancements as budget allows.
- Have an understanding of IT needs and solutions related to CRM.
- Have an understanding of financial application integration related to CRM.
- Have an understanding of cost-efficient solutions.
- Have a working style and approach that is compatible with THRHA's need for a long-term partner.

An Offeror's failure to demonstrate they meet these minimum requirements may cause the proposal to be determined nonresponsive and rejected. Any changes in personnel from the proposed Project

Manager or Project Team Member are subject to the **minimum requirements listed above**. The Project Manager proposed by the Offeror will be the sole point of contact for the full term of the resulting contract.

THRHA reserves the right to disqualify an individual Project Team Member proposed based on their failure to meet the minimum requirements, and still allow the Offeror to proceed in the evaluation process so long as the Offeror has proposed more personnel than just the unqualified member.

V. General Proposal Information

The following conditions also apply:

- THRHA, at its sole discretion, reserves the right to; reject any or all proposals, waive irregularities and minor informalities, request additional information, and accept the proposal deemed to be in the best interest of THRHA, whenever such rejection, waiver and award is determined to be in the best interest of THRHA.
- Proposals must be submitted by mail or email.
- Proposals are considered non-responsive and may be rejected if all required documents are not present. A complete proposal consists of all documents listed in Section VI – Technical Proposal.
- A complete proposal must also include a cover letter signed by the Offeror's official authorized to bind the Offeror contractually and contain a statement that the proposal is firm for 90 days.
- The successful Offeror must be an Equal Opportunity Employer.
- All information in the Offeror's response must be submitted on the RFP attachments provided. Any deviation in format or content will be grounds for finding the proposal nonresponsive and rejected. Accuracy and completeness are essential. The successful response will be incorporated into the resulting contract as an exhibit; therefore, Offerors should not make claims to which they are not prepared to commit themselves to contractually.
- Proposals received after the deadline will not be accepted. It is neither THRHA's responsibility nor practice, to acknowledge receipt of any proposal. It is the Offeror's responsibility to assure that a proposal is received in a timely manner.
- THRHA will not reimburse any expenses incurred by the Offeror, including, but not limited to; expenses associated with the preparation and submission of the response and/or attendance at interviews (if required). NOTE: Due to ongoing COVID-19 pandemic, any onsite work will require fully vaccinated individuals or an approved mitigation plan by the THRHA President & CEO.
- THRHA expects all Offerors to consent to the scope of services, general specifications, and all required services of the RFP.
- Offerors should carefully review this solicitation for defects and questionable or objectionable material. Comments concerning defects and objectionable material must be made in writing and received by the Procurement Coordinator by June 24, 2022.

Right of Rejection: Offerors must comply with all terms of the RFP, THRHA Procurement Policy, and all applicable local, state, federal and tribal laws, codes, and regulations. The Procurement Coordinator may reject any proposal that does not comply with all of the material and substantial terms, conditions, and performance requirements of the RFP.

Offeror's Certification: By signature on the proposal, Offerors certify that they comply with the following:

- ✓ Anti-Kickback Act
- ✓ Byrd Anti-Lobbying
- ✓ Clean Air Act
- ✓ Davis-Bacon Act
- ✓ Contract Work/Safety Standards
- ✓ Energy Policy and Conservation Act
- ✓ Equal Employment Opportunity Act and the regulations issued thereunder by the federal government
- ✓ Examination of Records by Comptroller General
- ✓ Patent Rights
- ✓ Retention of Records
- ✓ Reporting Requirements
- ✓ Rights in Data
- ✓ Termination for Convenience
- ✓ Termination for Default
- ✓ All terms and conditions of this RFP, and
- ✓ Condition that the proposal submitted was independently arrived at, without collusion, under penalty of perjury

If any Offeror fails to comply with the above, THRHA reserves the right to disregard the proposal, terminate the contract, or consider the contractor in default. THRHA may, at its sole discretion and after the evaluation process, choose not to issue any agreement. THRHA may also, at its sole discretion, choose to issue multiple awards (i.e. to multiple firms) if it is determined to be in the best interest of THRHA.

VI. Technical Proposal (Total of 75 Points)

Offerors must prove their ability experience, qualifications, management, and service methodology meets the requirements of the RFP.

1. Firm Experience and Qualifications (0 to 25 Points)

Describe how the firm meets the experience and minimum qualifications of the RFP.

Provide a brief summary of the history of your firm, its culture, time in business, what resources you have available in order provide the services required, and what unique

strengths you have that are relevant to the requirements being requested. In addition, please include:

- A description of your understanding of THRHA's needs in the proposed project and your staffing commitments to assure your ability to meet our timeframe;
- An overall experience summary of the firm's knowledge in CRM and working with non-profit agencies; and,
- The firm's facilities (primary and secondary offices), address, email, fax and phone numbers(s), and equipment
- Provide detailed resumes for each personnel assigned to this contract (Project Team Member) that will be responsible for THRHA's account and will oversee the daily work. The resumes must include, but not be limited to, the following:
 - Name & Title
 - Degree of Education & Credentials
 - Years of Relevant Experience with the organization
 - Responsibility with the organization.
- Provide the primary contact for the contract (Project Manager), and identify those who would be working in more specialized areas and describe their current principle responsibilities.
- Provide a selection of up to five (5) best CRM implementations that you have completed that are comparable or relevant to the work in the RFP.
- Provide a reference list of **at least three (3)** other Clients who currently use your firm's services.

THRHA may contact any other known clients, whether offered as references or otherwise, to obtain information that will assist THRHA in evaluating this proposal. THRHA retains the right to use reference information to make selection decisions. Submittal of a proposal is agreement that THRHA may contact and utilize such information for the evaluation of the Offeror's proposal.

Offeror use **Attachment C** to provide responses to the above.

2. Project Approach and Methodology (0 to 20 Points)

Service Description and Transition Proposal. Describe how you will:

- Implement the work requested in this RFP; more importantly, what obstacles that may be present and how you would mitigate them.
- The firm's strategy for project management that indicates how it intends to coordinate the proposed work with THRHA.
- Provide a list of items to be provided by THRHA to assist your firm in completing the requested work.
- Do you have a process in place for tracking communications between our organization?

- Provide a plan that outlines the procedures and a draft timeline your firm expects to use in completing the requested tasks.
- Provide a 30-day start-up plan that outlines your firm's approach to having THRHA as a client in the first 30 days after award.

Offerors use **Attachment D** to provide responses to the above.

3. Cost Proposal (0 to 30 Points)

The Offeror's proposed pricing must be broken down as outlined in Attachment E.

OPTIONAL TERMS

The Offeror must also provide their annual costs for the optional renewals.

Travel and Transportation: Travel and transportation expenses are set at the rates and regulations established and permitted by the United States government' Office of Management and Budget (OMB) Super Circular 2 CFR Part 200; in accordance with the Federal Travel Regulation (FTR 300-304) and THRHA Travel Policy.

All travel will be paid at actual expense and invoiced and reimbursed separately from the services contract.

Please note, your proposed pricing is considered 'all-inclusive' and includes all direct and indirect costs (labor, fringe benefits, equipment, supplies, and incidental costs). such as telephone, photocopying, and fax (these costs are not reimbursable). The pricing will remain firm throughout the initial term.

Upon completion of review of proposals received, THRHA reserves the right to conduct a "best and final offer" with Offerors who are susceptible for award.

Offerors use **Attachment E** as their Cost Proposal.

VII. Contract Terms and Conditions

THRHA will be responsible for managing the contract and the relationship with the awarded firm (Contractor). The Contractor will be responsible for managing all contracts and relationships with the subcontractors (if applicable). The Contractor will be required to adhere to all State and Federal provisions that govern the funding of the contract.

THRHA reserves the right to cancel the contract, at its convenience, with 30-days written notice to the Contractor. THRHA is only liable for payment due from services performed, supplies provided, before the effective date of the termination.

VIII. License, Bond and Insurance Requirements

The successful Offeror must provide proof of their current, valid professional and business licenses. Prior to contract approval, the successful Offeror will be required to provide proof of workers' compensation, commercial general liability, and commercial automobile liability insurance; naming THRHA as an Additional Insured under their Certificate of Insurance.

All licenses, bonds and insurance requirements must be valid at time of award and remain valid through the duration of the contract and all subsequent extensions or renewals.

The Offeror is required to have the following insurance under the contract.

- ✓ Commercial General Liability: The Contractor must have a minimum coverage limit of \$300,000 combined single limit per claim covering all business premises and operations used by the Contractor in the performance of services under this agreement.
- ✓ Workers' Compensation: The Contractor shall provide and maintain, for all employees engaged in work under this contract, coverage as required by AS 23.30.045, and; where applicable, any other statutory obligations including but not limited to Federal U.S.L. & H. and Jones Act requirements. The policy must waive subrogation against THRHA.
- ✓ Commercial Automobile Liability: The Contractor must have a minimum coverage limit of \$300,000 combined single limit per claim covering all vehicles used by the Contractor in the performance of services under this agreement.

In addition to the provisions of the RFP, all terms and conditions of **Appendix A** also apply.

IX. Submission Instructions

- If submitting by email:
Email proposals to rfp@thrha.org titled (subject):
RFP #2022-10-01
- If submitting by mail:
Your response must be sealed and delivered to:

Tlingit Haida Regional Housing Authority
ATTN: Kenneth Southerland
5446 Jenkins Drive
Juneau, Alaska 99801

- If submitting by carrier or in-person:
Your response must be sealed and delivered to:

Tlingit Haida Regional Housing Authority
ATTN: Kenneth Southerland
5446 Jenkins Drive
Juneau, Alaska 99801

X. Questions

Offerors are encouraged to contact the Procurement Coordinator to register for the IFB to ensure they receive all updates related to the solicitation. All IFB documents will be posted on THRHA website <http://regionalhousingauthority.org/resources/solicitations/>

XI. Proposal Timeline and Evaluation

Timeline

THRHA intends to follow the below timeline for review and award of this solicitation:

RFP Issued	06/01/2022
Deadline for Proposals	06/30/2022
Evaluation of Proposals	07/01/2022
Interviews and Additional Questions Conducted	07/05/2022
Vendor Selected	07/11/2022

Dates are subject to change at the discretion of THRHA.

Proposals must be received **no later than June 30, 2022 @ 4:30pm prevailing Alaska Time.**

Evaluation

THRHA is committed to a transparent process of award and selection of a vendor with the intention to secure the best possible solution(s) for THRHA’s ongoing needs while ensuring the best value to our organization.

An evaluation team will review, in detail, all proposals received to determine the best value. Following the initial review and screening of the written proposals, using the selection criteria described below, Offeror(s) will be invited to participate in the final selection process, which may include participation in an oral interview and/or submission of any additional written information as requested by THRHA.

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team. An Offeror can receive a maximum of **100 Points**:

Evaluation Criteria	Rating Points
Experience and Expertise – Vendor has successfully completed similar projects and has the qualifications, personnel and availability to complete this project.	0 to 25
Project Approach and Methodology	0 to 20
Cost	0 to 30
MBE/WBE/*	0 or 5
Statement regarding Training and Employment of Indians	0 to 5
Native Preference to Native Owned Business**	0 or 15

Total Points	100
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*Points for MBE/WBE cannot be combined with Native Preference points

**To be eligible for Native Preference points, bidders must submit evidence showing Indian Ownership to the Authority's satisfaction.

XII. Notice of Intent to Award

Once the Successful Offeror is determined, a Notice of Intent to Award will be sent to those respondents who submitted a proposal.

XIII. Period of Performance

This contract is for one year from the date of award; with the option to renew for two additional 1-year renewal options to be solely exercised by THRHA.

Unless otherwise stated in this RFP, THRHA and the successful Offeror/Contractor agree: (1) that any holding over of the contract, excluding any exercised renewal options, will be considered a month-to-month extension, and all other terms and conditions will remain in full force and effect; and (2) to provide written notice to the other party of the intent to cancel the month-to-month extension at least 30-days before the desired date of cancellation.

XIV. Termination

THRHA reserves the right to cancel the contract, in whole or in part, immediately, in the event the Contractor (or subcontractor) fails to perform the work in accordance with the provisions identified in this RFP.

Either party may terminate the contract with a 30 calendar days prior written notice.

XV. Attachments

The following attachments are required to be submitted with your proposal:

- ✓ Appendix A: Contract Provisions
- ✓ Attachment A: Proposal Checklist
- ✓ Attachment B: Proposal Cover Sheet
- ✓ Attachment C: Firm Experience and Qualifications
- ✓ Attachment D: Project Approach and Methodology
- ✓ Attachment E: Cost Proposal
- ✓ Attachment F: Debarment Certification
- ✓ Attachment G: Preference Questionnaire



Regional Housing Authority

Appendix A Contract Provisions

1. Inspections and Reports:

THRHA may inspect, in the manner and reasonable times it considers appropriate, all of the Contractor's facilities and activities under this contract. The Contractor will make progress and other reports in the manner and at the times THRHA reasonably requires.

2. Disputes:

Disputes arising in connection with the contract will be handled by THRHA. If the Contractor has a claim that it cannot be resolved with THRHA, a third-party reviewer will be used for final consideration and decision.

3. Default:

In case of default by the Contractor, for any reason, THRHA may procure the goods or services from another source and hold the Contractor responsible for any resulting cost and may seek other remedies under law or equity.

4. No Assignment or Delegation:

The Contractor may not assign or delegate any part of this contract or any right to any of the money to be paid under it, except by and with the written consent of the Procurement Coordinator.

5. No Additional Work or Material:

No claim for additional supplies or services, not specifically provided for and in this contract, performed or furnished by the Contractor, will be allowed, nor may the Contractor perform any work or furnish any material not covered by the contract unless the work or material is ordered in writing by the Procurement Coordinator.

6. Payment of Taxes:

As a condition of performance of this contract, the Contractor will pay all federal, State, and local taxes incurred by the Contractor and will require their payment by any subcontractor or any other persons in the performance of this contract. Satisfactory performance of this paragraph is a condition precedent to payment by THRHA.

7. Compliance:

In the performance of this contract, the Contractor must comply with all applicable federal, State, and borough regulations, codes, and laws, and be liable for all required insurance, licenses, permits and bonds.

8. Confidentiality:

Contractor will hold all information received from THRHA in strict confidence and will exercise a reasonable degree of care to prevent disclosure to others. Contractor will not disclose or divulge either directly or indirectly the confidential information to others unless first authorized to do so in writing by THRHA. Contractor will not reproduce the confidential information nor use this information commercially or for any purpose other than the performance of the contract.

9. Conflicting Provisions:

Unless specifically amended and approved by THRHA, the terms of this contract supersede any provisions the Contractor may seek to add. The Contractor may not add additional or different terms to this contract. The Contractor specifically acknowledges and agrees that, among other things, provisions in any documents it sees to append hereto that purport to (1) waive THRHA's sovereign immunity, (2) impose indemnification obligations on THRHA, or (3) seek to limit liability of the Contractor for acts of Contractor negligence, are expressly superseded by this contract and are void.

10. Contract Funding:

Contractors are advised that funds are available for the initial term of the contract. Payment and performance obligations for additional terms of the contract are subject to the availability of funds.

11. Contract Extension:

Unless otherwise provided, THRHA and the Contractor agree: (1) that any holding over of the contract excluding any exercised renewal options, will be considered as a month-to-month extension, and all other terms and conditions shall remain in full force and effect, and (2) to provide written notice to the other party of the intent to cancel such month-to-month extension at least thirty (30) days before the desired date of cancellation.

12. Severability:

If any provision of the contract is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provisions will not be affected; and, the rights and obligations of the parties will be construed and enforced as if the contract did not contain the particular provision held to be invalid.

13. Governing Law:

This contract is governed by the laws and policies of THRHA and appropriated funding sources. To the extent not otherwise governed by Article 2 of this Appendix, any claim concerning this contract may be brought only to the CEO or THRHA Attorney.

Attachment A – Proposal Checklist

The following documents are required for this solicitation. To be considered responsive, each Attachment and required document(s) must be submitted with your proposal. Provide a check in the box to acknowledge you have submitted each document.

REQUIRED DOCUMENTS	DOCUMENT TITLE	INCLUDED?
Attachment – A	Proposal Checklist	<input type="checkbox"/> YES
Attachment – B	Proposal Cover Sheet	<input type="checkbox"/> YES
Attachment – C	Firm Experience and Qualifications	<input type="checkbox"/> YES
Attachment – D	Project Approach and Methodology	<input type="checkbox"/> YES
Attachment – E	Cost Proposal	<input type="checkbox"/> YES
Attachment – F	Debarment Certification	<input type="checkbox"/> YES
Attachment – G	Preference Questionnaire	<input type="checkbox"/> YES

Attachment B – Proposal Cover Sheet

OFFEROR INFORMATION

This is the cover page for your proposal. By signing and submitting this attachment, you confirm that you comply with all provisions of the RFP; are a company officer empowered and authorized to bind the company legally and financially, and; if applicable, can provide notice that you qualify as a Minority / Women Owned Business and/or American Indian / Alaska Native Entity.

Failure to sign this attachment and provide the information required will deem your proposal nonresponsive and will be rejected.

RFP NUMBER:

2022-10-01

RFP NAME:

Customer Relations Management (CRM)

Contractor NAME:

MAILING ADDRESS:

TELEPHONE NUMBER:

FAX NUMBER:

FEDERAL TAX ID #:

**BUSINESS LICENSE
NUMBER:**

CONTACT NAME:

TITLE:

E-MAIL ADDRESS:

ALTERNATE PHONE #:

BY SIGNATURE ON THIS PAGE, THE OFFEROR HEREBY CERTIFIES THAT ALL INFORMATION PROVIDED IS TRUE AND SERVES TO BIND THE COMPANY TO THE PROVISIONS OF THE RFP AND RESULTING CONTRACT.

SIGNATURE

DATE

TITLE

Attachment C – Firm Experience and Qualifications

Instructions: Use this section or additional pages to demonstrate how you meet requirements.

Offeror's Response: Demonstrate you meet the minimum requirements of the RFP and Section VI.

Describe how the organization meets the minimum qualifications and experience requirements identified in the RFP, and Section VI. In order to be found responsive, Offerors must provide enough detail and information that responds to each item requested in this section and questions proposed.

Attachment D – Project Approach and Methodology

Instructions: Use this section or additional pages to demonstrate how you meet requirements.

Offeror's Response: Demonstrate you meet the minimum requirements of the RFP and Section VI.

Describe how the organization meets the minimum qualifications and experience requirements identified in the RFP, and Section VI. In order to be found responsive, Offerors must provide enough detail and information that responds to each item requested in this section and questions proposed.

Attachment E – Cost Proposal

OFFEROR'S NAME: _____

Instructions: Offerors must propose an all-inclusive price to perform the services required in the RFP and resulting contract.

Note: The fees provided in this form will be used for RFP cost evaluation and in the awarded contract.

Cost Proposal Guidelines:

Please provide your all-inclusive, proposed pricing that accounts for all associated, incurred costs under the initial term (1 year) and optional terms.

CRM

The price quote must encompass all design, production, programming, software licenses or acquisitions, sub-contractors and third-party vendor fees for development and maintenance of the CRM for an ongoing service agreement. Furthermore, quote should include your assumptions regarding staffing, number of hours and hourly rates:

\$ _____
(add Items 1 through 7)

- | | |
|---|----------|
| 1. Strategic research and discovery; familiarization with organizational components, needs and key staff. | \$ _____ |
| 2. Project scope recommendations and timeline | \$ _____ |
| 3. Development and implementation | \$ _____ |
| 4. Customization & testing | \$ _____ |
| 5. Training | \$ _____ |
| 6. Ongoing maintenance and technical support | \$ _____ |
| 7. Third party subscription fees | \$ _____ |

PRINT NAME & SIGNATURE

DATE

TITLE

Attachment F – Certification Regarding Debarment, Suspension, and Other Responsibility Matters

- (1) The prospective primary participant certifies to the best of its knowledge and belief, that it and its principals:
 - a) Are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded by any Federal, State, Local or Tribal department or agency;
 - b) Have not, within a seven-year period preceding this proposal, 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, Tribal or Local) transaction, contract or subcontract under a public transaction; violation of Federal or State anti-trust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property;
 - c) Are not presently indicted for or otherwise criminally or civilly charged a governmental entity (Federal, State, Tribe or Local) with commission of any of the offenses enumerated in paragraph (1) (b) of this certification; and
 - d) Have not, within a seven-year period preceding this proposal, had one or more public transactions (Federal, State, Tribal or local) terminated for cause or default.
 - e) Have not, within a seven-year period preceding this proposal, had a civil or criminal judgement rendered against them by a Tribal Court for any offense related to Indian Preference laws (including TERO provisions) or had a civil judgement rendered against them relating to the firm's status as an Indian contractor.
 - f) Have not, within a seven-year period preceding this proposal, had one or more contracts terminated for default by any Federal, State, Tribal or Local agencies.
- (2) Principals, for the purpose of this certification, means: officers; directors; owners; partners; and persons having primary management or supervisory responsibilities within a business entity (e.g. General Manager; Plant Manager; Head of Subsidiary, division, business segment, or similar positions).

- a) The Offeror must provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

I understand that a false statement on this certification may be grounds for rejection of this proposal or termination of the award. In addition, under 13 USC Sec. 1601, a false statement may result in a fine of up to \$10,000 or imprisonment for up to 5 years or both.

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Name & Title of Authorized Representative

Date

--	--

Signature of Authorized Representative

I am unable to certify to the above statements. My explanation is attached.

Attachment G – Preference Questionnaire

In order to qualify and receive any of the preferences, Offerors must provide supporting documentation with their proposal as well as check "YES" in the form provided. Failure to provide the information requested may determine your preference not applicable.

PREFERENCE FORM	CLAIMING PREFERENCE?
MBE/WBE	<input type="checkbox"/> YES / <input type="checkbox"/> NO
INDIAN OWNED FIRM	<input type="checkbox"/> YES / <input type="checkbox"/> NO