

Greater East Texas Community Action Program Weatherization Assistants Software Proposal

Purpose:

The purpose in soliciting Request for Proposals (RFP) is to provide a Weatherization Software Programs using grants from the Texas Department of Housing and Community Affairs, including federally funded programs using DOE and LIHEAP funds. Greater East Texas Community Action Program (GETCAP) is requesting proposals, priced on a fixed price basis, from qualified sources, to provide and deploy up-to-date weatherization software to streamline management and auditing processes and procedures.

The system should include a full range of operating and management functions using Enterprise Content Management (ECM) that suit the Weatherization Department's workflow. The software will be capable of capturing and processing data from the initial application, managing a priority list of demographic information, providing work orders, invoices, auditing functionality, and providing a customizable search field filtering options based on stored information.

Also, as a minimum, the system will provide the ability to reduce clutter of paperwork and data duplication, provide accurate billing reports that integrate with the finance software, produce customizable reports, verify case status, capacity to record data offline and flexible data caps. Lastly, the program will be malleable for GETCAP'S administrators. Specifically, the admin will be capable of adding users, adjusting user privileges, password resets, and will have internal contacts in case of system failure.

The scope of services must describe the elements of the software and technology system that would aid GETCAP in our mission of providing quality weatherization services in an efficient and economical manner including the use of an interactive app for assessors and contractors during on-site work. It is GETCAP'S intent to

make the opportunity available to vendors to offer proven software products that will address the functional elements required by GETCAP to adequately meet the weatherization department needs. The specifications not addressed are not intended as an omission regarding the vendor's software product/IT technology. A full-functioning software package is required to provide most, if not all the specifics.

Deliverables

All interested parties shall submit the following information to be considered responsive, as well as demonstrate its capabilities to provide, perform and complete the following tasks:

1. Provide a cover letter that contains, at a minimum, the following information: statement of interest; certification that the information and data submitted is true and complete to the best knowledge of the individual signing the letter; respondent's name, address, telephone number, fax number and email address of the individual to contact regarding the submittal; and an authorized partner shall sign the letter.
2. Provide a turn-key IT solution which consists of Weatherization Software for content management, data entry, invoicing, work orders, priority list, audit function, export and import, waitlist, demographics, application, storing files and data, work tracking, client contact notes, documentation/attachments, coded fund and search reporting, automated visual status updates, and implementation of software. Vendor to include, but not be limited to house data, material cost, labor cost, weatherization project type, etc. Detail the following points:
 - The proposer shall include a concise summary of the products and services being offered to meet the requirements of this RFP.
 - The proposer should also provide their approach to providing the services.
 - Software should be a complete suite of tools needed to run and automate GETCAP's Weatherization Department: house-client application, creating a priority list off the demographic information,

generating an invoice, creating a work order, audit functionality, and field filtering searching and reporting.

- Proposer should also include options and capabilities not listed in this RFP (i.e. automation capabilities, call functions, demographics such as ethnicity/race and economic data, training, query tools, data optimization, etc.).

- Implement the IT solution in a way all GETCAP's Weatherization Data is migrated to the new system. Detail the following points:
 1. The proposer shall describe the approach to meeting the implementation, training, documentation, and transition requirements as well as the "Go-Live" Plan.
 2. The proposer shall provide specifications for all recommended software and shall continually assess requirements for the system environment and provide specifications for any recommended changes to the GETCAP environment. These specifications should include all software (Weatherization Management Software) required for complete system integration. The proposer will also include optional pricing to establish, test and host the infrastructure defined.

- Provide any type of necessary software (or hardware) integration required to provide a seamless solution. Detail the following points:
 1. The proposer shall provide any type of necessary software or hardware integration required to provide a seamless solution. The system should deploy in a pilot environment to test all aspects of the system including full integration of Assessors' iOS tablets and SHAH, Abila, File Bound systems with weatherization software.
 2. The "Go-Live" Plan should include at least prerequisite activities including training, deployment steps, test plan, and data conversion.

- Develop and conduct training for system administrators, directors, project managers, train the trainers, users, etc. Detail the following points:

1. The proposer shall provide training to ensure all RPMC users have the knowledge.

and capability necessary to effectively use the system.

2. Training should be conducted at GETCAP's home office in Nacogdoches, Texas and at others.

GETCAP facilities as agreed to. A training plan shall be developed by the proposer and reviewed and approved by GETCAP and GETCAP's Management Team.

3. Training shall be conducted from installation through implementation.
4. The proposer shall provide user documentation including manuals, quick reference guides, tutorials, on-line and any configuration or customization.

documentation.

- Present a solution that will allow for the Finance/Accounting Department software to

integrate, or easily access and export information, to bill, reconcile, and forecast.

Detail the following points:

1. The proposer shall provide a solution to notify the Billing Department that invoices, and transactional activities are matched correctly.
2. An approach to notifying or alerting the Finance Department of errors and discrepancies, unintentional or not, and how the matter will be detected to resolve the problem in a timely manner.
3. Additionally, the proposer shall provide forecasting methods based on archived Weatherization data.

- Provide warranty, maintenance coverage, and tech support. Describe ongoing software and hardware maintenance plan, as well as support for your proposed solution. Detail the following points:
 1. The proposer shall warrant each deliverable for a period of one year after the system is fully implemented and accepted.
 2. During the warranty period, the proposer shall be responsible for correcting any issues causing any portion of the system to be inoperable or any issues resulting in inaccurate results produced by the system when the system is used in accordance with product documentation provided by the proposer and without extraordinary actions on the part of GETCAP or its users.

- The proposer shall provide a planned maintenance upgrade and data management strategy. The proposed maintenance and tech support agreement shall include at a minimum:
 1. Planned software and data upgrades and maintenance schedules. This should include any planned enhancement and any outstanding critical issues that are being addressed.
 2. Software upgrades procedures to ensure any software version upgrades compatible with the GETCAP's IT infrastructure.
 3. In a hosted environment, the procedure to notify GETCAP when the system must be halted to provide scheduled and unscheduled maintenance. Clearly defined roles, responsibilities and coordination processes should be provided.
 4. Document all customization or configuration to ensure reproducibility when GETCAP upgrades to a new release of the software.
 5. The proposer shall submit business continuity procedures and a disaster recovery plan which includes at a minimum recommended hardware and software, a data and security breach plan, and a documented disaster recovery plan.
 6. Hosting: GETCAP has determined where the software will be hosted (proposer should make recommendations). When hosted at proposer's

facility or other predetermined location, the proposer's hosting services shall include the following: features, at a minimum:

1. Type of website security
 2. Availability of system
 3. Data security
 4. Data center tier level
 5. Help desk services.
 6. Backup/disaster recovery plan
- Support twenty (20) or more users and provide the ability to increase scope with additional users and functionality. System must be adaptable to various types of weatherization services and funding requirements. Detail the following points:
 1. System shall allow user to view application and priority status, develop a work order with customizable funding fields using the assessment form, provide flexible and customizable navigation bars, capture all housing related information using a tablet, allow user to calculate optimal weatherization work to be done, allow user to add a work order and invoice for multiple types of funding source, ability to update housing and client information and status, and ability to integrate current software for efficiency.
 - Work closely with GETCAP'S Weatherization Management Team to develop a Project Plan and provide any required documentation including Test/Acceptance Plan, Transition Plan, and "Go-Live" Plan.
 - Provide qualifications, certifications, and references of key staff to be assigned to this project including technical staff. Detail the following points:
 1. The proposer will document successful past performance and relevant qualifications and experience.
 2. The proposer shall be a company in the business of developing Weatherization Management Software, integration, and maintenance for advanced software systems for a minimum of three (3) years within the last five (5) years. Within the last five (5) years, the company should have successfully completed projects that are similar in size and complexity.

3. A list of the proposers last five (5) installations should be included. The installations should reference previous experience in Weatherization and/or Nonprofit organizations.
- Provide price quotes for software, training, licensing (initial and annual), and maintenance and support. Detail the following points:
 1. The proposer shall list additional options/capabilities of software as applicable as well as all recurring costs including software updates, as applicable, and initial set-up fees, and warranties.
 2. The proposer should provide three (3) and five (5) year price quote options for upfront payment of all reoccurring fees, licenses, and warranties.
 3. It is highly recommended that proposers include pricing for multiple package options, so that GETCAP has the flexibility to build its own product package.
 - Indicate the number of years' experience operating such services in a stable, sound manner, as well as, references that include names, addresses and phone numbers of references familiar with the proposer's ability, experience, and reliability in the performance and management of projects of a similar nature.
 - Describe your organization's method and capacity to assure quality in the services requested through this RFP.

II. CERTIFICATION OF COMPLIANCE WITH REQUIRED ELEMENTS

This is to certify that to the best of the undersigned's knowledge and belief, the information in this proposal is responsive and is true and correct. The undersigned understands that a nonresponsive proposal, as defined by GETCAP, may not be reviewed, and considered for agreement/contract selection. Further, the submission of the proposal has been authorized by the governing body of the proposer.

Efforts will be made by GETCAP to utilize small businesses, owned, and controlled by socially and economically disadvantaged individuals and which have been certified as a DBE and HUB from through a state Uniform Certification Program.

Please indicate which best represents your business. (Check)

- HUB Vendor (Historically under- Utilized Business)
- DBE Vendor (Disadvantaged Business Enterprise)
- Minority Owned Business
- Business is part of a larger company (Please specify)
- Other (Please specify) _____

_____.

(Signature)

(Date)

_____.

(Print Name and Title)

_____.

(Print name and title of person authorized to negotiate a contract if different from person listed above.)

_____.

(Organization)

(Address) (City) (State) (Zip)

(Telephone Number)

III. ASSURANCES

We understand and agree that this proposal is not a contract and does not obligate GETCAP to pay for costs incurred in the preparation of this proposal or costs incurred prior to the execution of a written contract or prior to the receipt of funds designated for this program from the funding agency.

We understand and agree that the contract provisions may vary from the provisions set forth in this request, when deemed necessary by GETCAP. However, we agree to abide by the contract provisions contained in the proposed contract.

We understand and agree that we may be subject to an on-site review and must be able and willing to provide documentation of information in the proposal at the request of GETCAP prior to execution of a contract.

We understand and agree that GETCAP is not required to select the lowest cost proposal.

We understand and agree that any material misrepresentation or deliberate omission of a fact in this proposal may be justification for rejection of the proposal.

We understand and agree to abide by all federal, state, and local laws, policies and regulations governing these and those additional rules, which may be promulgated, or as amended, after the execution of a contract.

We understand and agree that we may be subject to a monitoring review or audit by GETCAP. We also understand that we may be required to provide a copy of the most recent audit as part of the contracting process. We understand and agree to submit this proposal in a good faith effort to provide services to the benefit of the economically disadvantaged individuals eligible for services under this proposal.

Signature:

_____ Date:

_____.

Printed Name:

Title: _____.