



Announcement to Eligible Vendors

The Green River Regional Educational Cooperative (GRREC), on behalf of its participating schools, invites your company to submit a proposal for an Accounting, Grant Management, and Data Collection System (GRREC Bid #DATA001)

GRREC wants to develop a long-term relationship that is profitable for the vendor while still providing aggressive pricing and great service to support accounting and grant services. The GRREC Bid Committee would prefer to award a contract to a single vendor but acknowledges this may not be possible; we will remain open to considering multiple products that may be integrated to meet our accounting, grant management, and data collection needs.

The contract effective dates shall be on/about July 1, 2014 with the opportunity to extend on a yearly basis. The GRREC Bid Committee will entertain written proposals inclusive of second year contracts. GRREC reserves the right to offer month-by-month extensions until a new contract is awarded.

Two categories of systems are detailed in Attachment 4: Specifications, beginning on page 22 of this RFP.

Proposals are due at 10:00 A.M. on Wednesday, June 25, 2014. Each Vendor is responsible for determining all factors necessary for submission of a comprehensive bid proposal. Added value features such as guaranteed savings, warranty service, experienced staff, etc. will play a role in the final vendor selection. Price alone will not be the final determining factor.

Questions may be emailed to: Johna Rodgers (johna.rodgers@grrec.ky.gov).

REQUEST FOR PROPOSALS

NOTICE TO VENDORS

Green River Regional Educational Cooperative (GRREC)

www.grrec.ky.gov

will receive proposals until

10:00 a.m., Wednesday, June 25, 2014 for:

Accounting, Grant Management, and Data Collection System
GRREC Bid #DATA001

Late proposals will not be considered. For information regarding this notice and the competitive acquisition process, interested vendors shall contact only:

Johna Rodgers, Development Director
Phone: 270-563-2113 (w), 270-991-7470 (c)
Email: johna.rodgers@grrec.ky.gov

SECTION 1 – INTRODUCTION

1.1 Purpose and Background

The purpose of this Request for Proposals (RFP) is to solicit proposals from qualified vendors wishing to provide an Accounting, Grant Management, and Data Collection System (hereafter referred to as DATA) System services to the Green River Regional Educational Cooperative (GRREC) and its participating districts.

1.2 Definitions

The following terms and acronyms appear throughout the Request for Proposals (RFP).

Awarded Vendor: The Vendor awarded the bid as a result of this RFP.

Contract: A fully executed written agreement, hereafter referred to as Contract, between Green River Regional Educational Cooperative (GRREC) and the Awarded Vendor.

Contract Prices: Prices of Awarded Vendor's items and services purchased by GRREC and its participating schools remain firm throughout the period of the contract, hereafter referred to as Contract Prices.

Contract Term: The contract will run from July 1, 2014 to July 1, 2015, and the contract may be extended on an annual basis for an additional 3 years. GRREC reserves the right to review the contract annually. GRREC reserves the right to offer month-by-month extensions until a new contract is awarded. Dates of the initial contract may also be adjusted based on the mutual needs of GRREC and the Vendor.

GRREC: The Green River Regional Educational Cooperative hereafter referred to as the GRREC, represents 37 school districts in Kentucky as well as Western Kentucky University. It is the intent of the GRREC in seeking bids for these items to provide tools and systems to support our daily financial operation as well as grant and data collection efforts.

Vendor: Company, organization or other business entity submitting a proposal in response to this RFP.

1.3 Background Information

This RFP is designed to provide Vendors with the information necessary for the preparation of competitive bid proposals. The RFP process is for the benefit of GRREC for its ongoing operations and is intended to provide competitive information to assist in the selection process. It is not intended to be comprehensive. Each Vendor is responsible for determining all factors necessary for submission of a comprehensive bid proposal.

SECTION 2 - ADMINISTRATIVE INFORMATION

2.1 Inquiries

- A. All inquiries concerning this RFP shall be submitted in writing to the issuing officer as noted in Section 6.
- i. During the procurement, including any period of evaluation, the Vendor shall contact only the issuing officers regarding this RFP. Discussing the RFP with any other GRREC employee until the GRREC issues a Notice to Award may result in disqualification.
 - ii. In NO CASE shall verbal communications override written communication. Only written communications are binding in this GRREC RFP process.
 - iii. GRREC assumes no responsibility for representations concerning conditions made by its officers or state employees prior to the execution of a legal contract, unless such representations are specifically incorporated into this RFP or written addenda to the RFP. Verbal discussions pertaining to modifications or clarifications of this RFP shall not be considered part of the RFP unless confirmed in writing. Any information provided by the Vendor verbally shall not be considered part of that Vendor's proposal. Only written communications from the Vendor received by the GRREC shall be considered.

2.2 Amendment to the RFP and Bid Proposal and Withdrawal of Proposals

GRREC reserves the right to amend the RFP at any time. The Vendor shall acknowledge receipt of an amendment in its proposal.

The Vendor may amend its proposal at any time prior to the due date of proposals. The amendment must be in writing, signed by the Vendor and received by GRREC prior to the time set for the receipt of proposals.

Upon written notice to the Issuing Officer, Vendors may withdraw, modify, or resubmit proposals at any time prior to the time set for the receipt of proposals.

2.3 Rejection of Proposals

GRREC will reject any proposal outright if the Vendor fails to deliver the proposal by the due date and time.

GRREC may reject any proposal outright and will evaluate for any of the following reasons:

1. The Vendor states that a service requirement cannot be met.
2. The Vendor's response materially changes a service requirement.
3. The Vendor initiates unauthorized contact regarding the RFP with GRREC officers or other employees.
4. The Vendor provides misleading or inaccurate responses.

In addition, GRREC reserves the right to accept or reject any part of any proposal, and to accept or reject any or all proposals without penalty. Any proposal may also be rejected outright for any one of the following reasons:

1. The Vendor's response limits the rights of the GRREC.
2. The Vendor fails to include information necessary to substantiate that it will be able to meet service requirements necessary for the proposal to be adequately evaluated. A response of "will comply" or merely repeating the requirement is not sufficient. Responses must indicate present capability; representations that future developments will satisfy the requirement are not sufficient.
3. The Vendor fails to respond to the GRREC request for information, documents, or references.
4. The Vendor fails to include any signature, certification, authorization, stipulation, disclosure or guarantee requested.
5. The Vendor presents the information requested by this RFP in a format inconsistent with the instructions of the RFP.

2.4 Proposal Obligations

The content of the proposal and any clarification thereto submitted by the Awarded Vendor shall become a part of the contractual obligation if it is incorporated by reference into the ensuing contract(s) of the Awarded Vendor.

2.5 Public Records

All bids submitted to this RFP shall become the property of the Green River Regional Educational Cooperative (GRREC) and will become a matter of public record, available for review, subsequent to the award notification. Bids may be viewed at GRREC, 230 Technology Way, Bowling Green, KY under the supervision of Johna Rodgers or her designee.

2.6 Proposal Property of the Green River Regional Educational Cooperative (GRREC)

All proposals become the property of GRREC and shall not be returned to the Vendor unless all proposals are rejected. In the event all proposals are rejected, Vendors will be asked to send prepaid shipping instruments to the GRREC for return of the proposals submitted. In the event no shipping instruments are received by the GRREC the proposals will be destroyed by the GRREC. Additionally, the evaluation documents created by the GRREC will be destroyed in the event all proposals are rejected.

2.7 Conflicts between Terms

GRREC reserves the right to accept or reject any exceptions taken by the Vendor to the terms and conditions of this RFP. Should the Vendor take exception to the terms and conditions required by the GRREC, the Vendor's exceptions may be rejected and the entire proposal declared non-responsive. The GRREC may elect to negotiate with Vendor regarding contract terms that do not materially alter the substantive requirements of the RFP or the contents of the Vendor's proposal.

2.8 Kentucky Statutes and Rules

The terms and conditions of this RFP and the resulting contract or activities based upon this RFP shall be construed in accordance with the laws of the State of Kentucky.

2.9 News Releases

News releases or other materials made available to the public, the Vendor's clients or potential clients pertaining to this procurement or any part of the proposal shall not be made without the prior written approval of the GRREC.

2.10 Copyrights

By submitting a proposal, the Vendor agrees that GRREC may copy the proposal for the purposes of facilitating the evaluation or to respond to requests for public records. The Vendor consents to such copying by submitting a proposal and warrants that such copying will not violate the rights of any third party. The GRREC will have the right to use ideas or adaptations of ideas, which are presented in the proposals.

2.11 Release of Claims

With the submission of a proposal, each Vendor agrees that it will not bring any claim or have cause of action against the GRREC based on any misunderstanding concerning the information provided herein or concerning the Green River Regional Educational Cooperative failure, negligent or otherwise, to provide the Vendor with pertinent information as intended by this RFP.

2.12 Vendor Qualification Requirement

With the submission of a proposal, each Vendor must certify that it is qualified to do business in the State of Kentucky

2.13 Award Notice and Acceptance Period

A Notice to Award the contract will be forwarded to all Vendors submitting a timely proposal. After the announcement of the apparent Awarded Vendor, negotiation and execution of the contract shall commence. If the apparent Awarded Vendor fails to negotiate and deliver an executed contract within 10 days from the date of award, Green River Regional Educational Cooperative, in its sole discretion, may cancel the award and award the contract to the next highest ranked Vendor or withdraw the RFP. Before the Notice to Award is issued all details of proposals and scoring remain confidential. After the Notice to Award is issued, all proposals and scoring immediately become public information.

2.14 Time Period within which to file an Appeal

A Vendor whose proposal has been timely filed and who is aggrieved by the award of GRREC may appeal the decision by filing a written notice of appeal. The notice must be filed within five days of the date of the Notice to Award issued by GRREC, exclusive of Saturdays, Sundays, and legal state holidays. The notice of appeal must clearly and fully identify all issues being contested by reference to the page, and section of the RFP and / or the Notice to Award. A notice of appeal will not stay negotiations with the apparent Awarded Vendor.

The appeal will be reviewed by the Green River Regional Educational Cooperative – (GRREC) Bid Committee who will provide a written response within ten (10) calendar days after receiving the appeal. If the appealing party is not satisfied with the response, the protestor may appeal to the Green River Regional Educational Cooperative – (GRREC) Bid Committee for further review. Further review must be

requested in writing within five (5) calendar days after the date of the response; and must state the reasons the response is being rejected.

The GRREC Bid Committee will review the original appeal and supporting documentation; the response and supporting documentation; and the request for review and supporting documentation. The GRREC Bid Committee may also request further information to assist in its review. The GRREC Bid Committee will meet to rule on the appeal not later than ten (10) days after receipt for further review. The decision of the GRREC Bid Committee shall be in writing, and shall be the final decision of the GRREC.

2.15 Miscellaneous

- A. GRREC reserves the right to accept or reject any part of any proposal and to accept or reject any or all proposals without penalty.
- B. GRREC reserves the right to waive minor deficiencies and informalities if, in the judgment of the GRREC, its best interest will be served.
- C. GRREC reserves the right to make a written request for additional information from a Vendor to assist in understanding or clarifying a proposal. Any information received shall not be considered in the evaluation of the Vendor's proposal if it materially alters the content of the proposal.

SECTION 3 – GENERAL TERMS AND CONDITIONS

3.1 Preface and Agreement Term

The following contractual terms and conditions plus special details that may be found in Section 4 will be included in any contract resulting from this Request for Proposal. Note: prospective Vendors may propose other or different contractual terms and conditions; however, GRREC reserves the right to reject the prospective Vendor's terms and conditions in whole or in part. If a prospective Vendor takes exception to any of the terms and conditions as stated herein, a prospective Vendor must include in its response to the RFP any additional or different terms and conditions that it is proposing. If a prospective Vendor takes exception to any of the terms and conditions and fails to include other or different terms and conditions in its proposal it may be grounds for the Green River Regional Educational Cooperative, in its sole discretion, to declare the Vendor's proposal non-responsive and to reject the proposal from evaluation or from award. The terms and conditions as stated herein relate only to this RFP and do not extend to other or future contracts a prospective Vendor may currently have or may have in the future with GRREC, nor do the terms and conditions as stated herein relate to any other GRREC procurement which may be in process.

The agreement term shall be as follows. The effective date shall be the date by which both parties had signed the agreement following execution. Green River Regional Educational Cooperative reserves the right to offer month-by-month extensions until a new contract is awarded.

3.2 Participating Schools and Additional Potential Clients:

While GRREC often seeks out bids for products or services to support our regional schools and districts, this RFP relates to a system and services for the cooperative's internal use; it is not issued as a regional bid for schools/districts.

3.3 Specifications:

- A. Unless otherwise specified, items shall be new and unused and of current production.
- B. Manufacturer's standard warranty shall apply unless otherwise stated in the agreement.

3.4 Audits

The Awarded Vendor agrees that GRREC Bid Committee may audit the Awarded Vendor records to establish compliance to the Contract. The Awarded Vendor further agrees to provide verifiable documentation tracking product sold through this contract. Audits may be done on a quarterly basis, based on random sample selection process and procedures to be established by GRREC or their auditing firm. Failure to provide necessary information requested by the GRREC or their auditors will carry a financial penalty of one percent (1%) of the total quarterly sales volume. GRREC will provide a 48-hour notice on items to be audited. Audits will be conducted at the Awarded Vendor corporate office, or done via e-mail, fax or Internet. The Awarded Vendor will assist as needed at the time of the audit.

3.5 Defects and Damages

The Awarded Vendor shall accept full responsibility and pay for return shipping charges on any item received by the Green River Regional Educational Cooperative or participating schools that is found to be deficient in quality; defective in packaging; fails to meet specifications; arrives in inoperable condition; or

is an unauthorized substitution so as to render the item unsuitable for its intended purpose. Changes to GRREC orders will not be accepted without prior approval. Errors made by the Awarded Vendors must be corrected within seven (7) calendar days.

3.6 Sales Representation/Marketing

The Awarded Vendor will provide sales staff knowledgeable of the GRREC Contract to service GRREC. All correspondence and marketing efforts regarding this Contract shall include the GRREC logo and a statement regarding the partnership between the Awarded Vendor and the GRREC.

3.7 Compliance with Program Requirements

The Awarded Vendor shall comply with the regulations and certification requirements of the State of Kentucky and all rules and regulations of the Green River Regional Educational Cooperative – (GRREC).

3.8 Affirmative Action - Contract Compliance

The Awarded Vendor is prohibited from engaging in discriminatory employment practices forbidden by federal and state law, and executive orders, pertaining to equal employment opportunity and affirmative action. The contractor, subcontractor, Vendor or supplier may be required to have on file a copy of their affirmative action program, containing goal and time specifications. Contractors, subcontractors, Vendors or suppliers doing business with the GRREC in excess of \$5,000 annually and employing 50 or more full-time employees may be required to submit to the GRREC, a copy of their affirmative action plan. Failure to fulfill these non-discrimination requirements shall be regarded as a material breach of contract and may cause the contract to be canceled, terminated, or suspended in whole or in part. The contractor, subcontractor, Vendor or supplier may be declared ineligible for future contracts or subject to other sanctions as provided by law or rule for said breach.

3.9 Compliance with Proposal

The Awarded Vendor will be required to furnish all information as specified herein. The GRREC reserves the right to waive compliance on minor technicalities in the specification, to reject any or all proposals, and to accept the proposal(s) which appear to be in the best interest of the GRREC. No exceptions or deviations from this specification will be considered at the time of the opening.

3.10 Taxes

Prices quoted shall not include state or federal taxes from which GRREC is exempt. The necessary exemption certificate will be furnished upon request by GRREC or the participating school. Project exemption certificates will be the responsibility of the participating school district.

3.11 Separate Bids

If the Vendor wishes to submit an alternate proposal(s), said proposal(s) must be appropriately identified as a separate bid. All conditions required for an initial proposal are applicable for separate alternate proposal(s).

3.12 Ties and Reservations

No ties or reservations by the Vendor are permitted.

3.13 Infringement

Awarded Vendor warrants all goods purchased shall be delivered free of the rightful claim of any third party by way of infringement.

3.14 Catalogs and Specifications

All items bid must meet GRREC bid specification. If Vendor submits an alternate item for consideration, vendor shall make notation in "Vendor Notes". Catalogs, specification sheets, or other literature giving detailed information of the items offered shall be filed with the proposal. The items shall be clearly identified and marked in the catalog, specification sheet, or literature by model name or number. Modifications or deviations from printed literature or accessory items not covered by printed literature shall be described in a written statement by model name or number.

3.15 Contract Award

The contract between GRREC and the Awarded Vendor shall be a combination of the specifications, terms and conditions of the proposal, any terms of Vendor's response accepted by GRREC and any written clarifications or changes made by GRREC in accordance with the provisions herein.

3.16 Contract

After the contract with the Awarded Vendor has been properly executed, the contract shall be made available to all GRREC participating schools by mail or transmitted via internet and the GRREC website.

3.17 Remedies Upon Default

Any of the following events shall constitute cause for the GRREC to declare an Awarded Vendor in default of its obligations under this contract:

- A. Non-performance of Awarded Vendor's contract;
 - 1. Failure by Awarded Vendor to make substantial and timely progress toward performance of the contract.
 - 2. Failure of items provided by Awarded Vendor to meet the specifications noted herein.
 - 3. Breach of any term of Awarded Vendor's contract
- B. GRREC shall issue a written notice of default providing therein for a five (5) day period in which the Awarded Vendor shall have an opportunity to cure, provided that cure is possible and feasible. If, after opportunity to cure, the default remains, the GRREC may do one or more of the following:

1. Procure goods or services in substitution from an alternate source and charge the difference between the contract price and alternate price to the defaulting Awarded Vendor.
2. Exercise any remedy provided by law or immediately terminate the contract.
3. Awarded Vendor shall not be considered to be in default under this agreement, if performance is delayed or made impossible by an act of God, floods or fires.

The fact that the delay resulted from a sub-vendor's conduct, negligence or failure to perform shall not excuse the Awarded Vendor from the provisions of its contract. Should GRREC obtain a money judgment against the Awarded Vendor as a result of a breach of this agreement, the Awarded Vendor consents to such judgment being set-off against moneys owed the Awarded Vendor by GRREC or any of its participating schools under this or any other contract.

3.19 Assignment - GRREC Right to Assign

In the event of a cancellation, GRREC specifically reserves the right, in its sole discretion, to assign and transfer its interest in any contract, consistent with the terms and conditions of any contract, to any organization, along with all corresponding duties, responsibilities for both parties and provisions contained herein.

SECTION 4 – SPECIFIC TERMS AND CONDITIONS

4.1 Pricing

- A. The Awarded Vendor agrees to provide pricing to GRREC that is as low as or lower than pricing available to similar customers, and the pricing shall remain so throughout the duration of the contract. Prices quoted are to be unique only to the Green River Regional Educational Cooperative and should include all shipping and handling charges, if applicable, for delivery to Green River Regional Educational Cooperative site(s) (See Attachment 5: Vendor Pricing Information). Refer to “Terms of Contract”, “Administrative Fees”, and “Shipping Costs” for additional information concerning bid prices.
- B. All product enhancements, upgrades, and new product releases that fall within the scope of this agreement shall be made available by successful vendor(s).

4.2 Ordering/Delivery

- A. GRREC uses the following ordering/delivery procedures:
 - 1. Purchase orders will be issued by GRREC
 - 2. Vendor will work directly with the designated to staff member prior to delivery of goods
 - 3. Vendor must issue invoices directly to GRREC as specified on purchase order

4.3 Administrative Fee

Administrative fees, required by GRREC for bids related to our member school districts, are not required for this bid, as the products and services to be purchased are for the sole use of GRREC for its daily operations.

4.4 Additional Responsibilities of Awarded Vendor

The Awarded Vendor will provide sales and training staff knowledgeable of the GRREC agreement. One staff member will be designated as the primary contact for GRREC administrative details.

4.5 Authority

This solicitation, as well as any resultant agreement, is issued under the general authority of the state laws of Kentucky. Further, this bid process is being conducted pursuant to the Policies and Procedures established by GRREC for the operation of business.

4.6 Discontinued Product

In the event that the manufacturer discontinues a product or model, it is the vendor’s responsibility to immediately contact the school issuing the purchase order. At that time the school shall have the option to accept alternative product or cancel their order.

4.7 Force Majeure

Except for payments of sums due, neither party shall be liable to the other nor deemed in default under this contract if and to the extent that such party’s performance of this contract is prevented by reason of Force Majeure. The term “Force Majeure” means an occurrence that is beyond the control of the party affected and occurs without its fault of negligence. Without limiting the forgoing, Force Majeure

includes acts of God; fire; flood; or other similar occurrences beyond the control of the contractor or the school district.

4.8 Invoicing

Vendor will invoice GRREC directly for purchase orders reflecting products and/or services.

4.9 Late Shipments

In the event of deliveries that will be delayed for any reason, it will be the vendor responsibility to immediately contact GRREC. GRREC reserves the right to cancel the order if work does not begin as outlined within this RFP. If a product/service is not received by the completion date and it must be purchased on the open market, the difference in cost will be charged back to the awarded vendor.

4.11 Product Safety

Vendors are responsible to insure that all items meet applicable safety codes and that all electrical equipment will be Underwriters Laboratory approved.

4.12 Quantities

GRREC will work with the Awarded Vendor to ensure the appropriate user access for ongoing operation of the systems purchased.

4.13 Responsibilities of GRREC

- A. Monitor all purchases.
- B. Provide a GRREC staff member to serve as the representative for the purchase, implementation and training for other staff members.
- C. The Green River Regional Educational Cooperative Bid Committee will manage the audit of the Awarded Vendor to ensure total compliance with the contract.

4.14 Right of Assurance

Whenever one party to this contract, in good faith, has reason to question the other party's intent to perform, he/she may demand that the other party give a written assurance of this intent to perform.

4.15 Right of Refusal

- A. The Green River Regional Educational Cooperative Bid Committee reserves the right to refuse any and all bids, reject any and all bids and/or the selection of item by item.
- B. GRREC reserves the right to return/discontinue use of any item that does not meet the specifications and requirements listed for that item in this RFP.

4.16 Warranties

Vendor shall be responsible for providing the manufacturers standard warranty and documentation thereof and shall, upon request, supply the name and location of available repair sources to the participating schools.

SECTION 5 – TIMELINE

5.1 Timeline

The timeline for this Agreement is:

- RFP sent out: on/about June 10, 2014
- Proposals/Bids due by 10:00 a.m.: June 25, 2014
- Bid award brought before GRREC Executive Committee or other appropriate authorizing group: on/about June 27, 2014
- Contract begins: on/about July 1, 2014
- Contract termination or renewal: on/about July 1, 2015

5.2 Date, Time and Place to Submit Proposal

Pursuant to the action of GRREC Bid Committee, proposals will be received at the Green River Regional Educational Cooperative, 230 Technology Way, Bowling Green, KY 42101 until the time listed in 5.1 above. Hard copy proposals should be placed in an envelope and clearly identified as GRREC Bid #DATA001. Bids may be submitted electronically, also including the bid number, to: johna.rodgers@grrec.ky.gov.

All proposals received prior to the time and date set forth above for the submission of proposals will be opened publicly and read aloud. Bids will not be available for public inspection at the time of the opening of the bids.

The place for opening of such bids has been set for the time and date noted in 5.1 above at the Green River Regional Educational Cooperative, 230 Technology Way, Bowling Green, KY 42101 at which time and place all interested persons are invited to attend.

PROPOSAL FORMAT AND CONTENT

GRREC Issuing Officer

All inquiries concerning this RFP shall be submitted in writing to the issuing officer:

Name: Johna Rodgers, GPC
Address 1: Green River Regional Educational Cooperative
Address 2: 230 Technology Way
Address 3: Bowling Green, KY 42101
Phone: 270-563-2113; 270-991-7470
Fax: 270-563-2208
Email: johna.rodgers@grrec.ky.gov

Format of the Proposal

The proposal may be submitted in either hard copy or electronic format, with the latter to include only such programs or formats generally utilized at GRREC (e.g., Word, Excel, PDF, etc.). All answers that are given to the questions asked in the RFP are subject to verification. Misleading and/or inaccurate answers shall be grounds for disqualification at any stage in the procurement process.

The proposal shall be clearly labeled with the following information:

- Vendor's Name and Address
- RFP Number
- RFP Name
- Proposal Due Date
- Issuing Officer's Name

The proposal shall consist of the following elements in the order given below:

- A. Cover or Title Page including RFP Reference Number
- B. Cover letter
- C. Table of Contents
- D. Executive Summary
- E. The Vendor shall provide response to Attachment 1: RFP Vendor Worksheet
- F. The Vendor shall complete Attachment 2: Vendor Signature Page
- G. The Vendor shall complete Attachment 3: Bidder Qualifications Statement
- H. The Vendor shall complete Attachment 4: Specifications (Category 1, 2)
- I. The Vendor shall complete Attachment 5: Vendor Pricing Information
- J. The Vendor shall complete Attachment 6: Vendor RFP Checklist
- K. Proposal submitted in hard copy and/or accessible electronic format. Electronic version shall be emailed directly to johna.rodgers@grrec.ky.gov. Files shall be reasonable in size to ensure arrival electronically; Vendor may also choose to use a cloud storage link for delivery.
- L. Proposal format shall not include elaborate fonts.

EVALUATION CRITERIA

Criteria For Bid Award

Bid award and acceptance shall be based on, but not limited to the following:

- A. Attention to detail of submitted proposal.
- B. Competitive pricing.
- C. Quality and completeness of the Vendor RFP Worksheet.
- D. Vendor's proof of ability to provide service and support for this contract.
- E. Vendor's past performance, reputation and references.
- F. Proposed value added services.
- G. Compliance with required reporting features.
- H. Vendor presentation (if requested by proposal review committee).

The following consideration will be given to current vendor's past performance of...

- A. Attention to detail of orders
- B. Knowledge of product and service
- C. Salesperson(s) available at all times to answer questions
- D. Pre-sale and post-sale support as needed
- E. Intervention as needed for defective product
- F. Reports as requested by Green River Regional Educational Cooperative
- G. Value added services
- H. Rapid response to all of the above

Attachment 1: Vendor RFP Worksheet
Accounting, Grant Management, and Data Collection System

1. Vendor Name:

2. Customer Communications/Service:

- A. Do you have a toll-free phone number for service and support (yes or no)?
- B. Do you have a toll-free phone number for questions regarding contract status, product info, etc. (yes or no)?
- C. Please list office hours in Central Standard/Daylight Time.
- D. Is it possible a GRREC staff member would get voice mail if they call in with a question or order (yes or no)?
- E. Do you provide assistance at no cost (yes or no)?
- F. Describe in detail the staffing that will be in place to accommodate GRREC if you are awarded this contract.
- G. Please list all additional customer communication/service value added services you will provide if awarded this contract.

3. Company's Focus

- A. Is working with nonprofit organizations, educational organizations, and/or schools your company's main focus (yes or no)?
- B. If yes, describe in detail how your company's main focus is directed toward one or all of those entities.
- C. If no, describe in detail the main focus of your company.

4. References

Provide at least three client references for which you are providing a service similar in scope and deliverables as required in this RFP. Include the name, address and phone number of the contact person for each with a brief description of the service they have contracted. Please attach to the proposal form.

5. Vendor Questions/Presentations

- A. Will a representative from your company be available by phone during the RFP time period to answer questions or to clarify information regarding this RFP (yes or no)?
 - Name:
 - Position:
 - Phone:
 - E-mail:
- B. Will a representative from your company be available upon request either in person or via conference call to answer questions of the GRREC Bids Committee (yes or no)?
 - a. Name:
 - b. Position:
 - c. Phone:
 - d. E-mail:

6. Bid Proposal

Vendors must submit proposals for the attached list of products on paper and/or electronically. Proposals submitted in this template form shall be used to establish the extent of a producer's products available and to make price comparisons between vendors. Proposed pricing must be furnished.

A template is provided with this RFP.

GRREC shall not be responsible for the malfunction of any or all submitted electronic components.

If your company is awarded this bid, will the prices be unique to GRREC (yes or no)?

If your company is awarded this bid, will the prices be inclusive of any membership or association discounts related to GRREC or its staff members (e.g., Grant Professional Association; yes or no)?

Attachment 2: GRREC Vendor Signature Page
Accounting, Grant Management, and Data Collection System

Please fill out this form and return with your bid.

Please do not complete this agreement unless you check yes to all the following statements. If the following information is not completed, your agreement cannot be processed.

_____ Yes, it is acknowledged that the vendor has received and reviewed the RFP and agrees to be bound by those terms and conditions unless specifically noted.

_____ Yes, all prices shall remain firm for the period of the contract as noted in the RFP. (Unless exceptions are noted.)

Signature by officer with the authority to bind the vendor to providing the services proposed.	Name of person who will represent vendor as the GRREC contact.
Company Name:	Account Representative Signature:
Authorization Signature:	Title/Date:
Title/Date:	Please print signature name in block lettering.
Please print signature name in block lettering.	Address 1:
Address 1:	Address 2:
Address 2:	Address 3:
Address 3:	Phone:
Phone:	Fax:
Fax:	E-mail:
E-mail:	

Attachment 3: GRREC Bidder's Qualifications Statement
Accounting, Grant Management, and Data Collection System

1. Name of Bidder:
2. Permanent Main Office Address:
3. When organized:
4. If incorporated, when and where:
5. How many years have you been engaged in the contracting business under your present firm or trading name?
6. General character of work is performed by your company:
7. Have you ever failed to complete any work awarded to you?
8. Financial Information:
 - a. State name of Bank with whom you do your principal business:
 - b. Address:
 - c. City:
 - d. State:
 - e. Phone Number:
 - f. State five trade references with whom you do business
 - i.
 - ii.
 - iii.
 - iv.
 - v.
9. Experience in work similar in importance to this contract:
10. Average number of employees on your payroll during the past year:
11. Have you ever been declared ineligible to receive awards on contracts from the Federal or State Governments (yes or no)?
12. If any Bidder feels that any information other than that requested above is pertinent to a determination of bidder's qualifications, such information may be added hereto and submitted together with this statement.

The undersigned authorizes its agents to furnish information requested for this bid to GRREC in verification of the recitals comprising this statement of Bidder's Qualifications.

Dated at _____ this ____ day of _____, 2013

Name of Bidder:

By:

Title:

State of:

County of:

_____, being duly sworn deposes and says that he is and that the answers to the foregoing questions and all statements contained herein are true and correct.

SWORN to before me this ____ day of _____, 2014

Notary Public (include stamp)

BID PROPOSAL

In submitting this bid it is understood that the right to reject any and all bids has been reserved and that this bid may not be withdrawn for a period of thirty (30) days from the opening thereof.

Dated this _____ day of _____, 2014.

If a corporation, what is the State of incorporation?

If a partnership, state full name of all co-partners.

Official Name and Address of Company:

Telephone Number:

Seal if by Corporation:

Dated:

Name:

Title:

Attachment 4: Specifications

Accounting, Grant Management, and Data Collection System

1. Please provide a succinct description and any accompanying documentation of the training you will provide to customers both in terms of content and pricing.
2. If your company is awarded this bid, will the prices be unique to GRREC as stated (Yes or No)?
3. If your company is awarded this bid, will your pricing to GRREC be as low or lower than pricing available to similar customers and will your pricing remain so throughout the duration of the contract (Yes or No)?
4. Within 6 weeks of award (or in a timeframe agreed to by both parties), would your company have the ability to begin implementation of the solicited systems and services (Yes or No)?
5. Do you have the capability to provide 24/7 tech support to users? (Yes or No)?
6. Is there another system that should be in place for integration with your systems to run more smoothly? (Yes or No). If yes, what system?
7. Will your system keep up with state and federal reporting requirements as they change and be able to comply with our required reporting (Yes or No)?

Category 1: Accounting, finance and purchasing system
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1. Robust accounting system that allows for budgeting, account reconciliation, payroll, purchase orders, billing/invoicing, general ledger, accounts payable/receivable, direct deposit, electronic requisitions, etc.
2. Secure system that provides tiered user/security settings, including a wide range of options from executive view-only dashboards to mid-user data and budget review to full-access operation for accounting staff, etc. This will include a secure log of activities available in real-time for key, designated users.
3. Step-by-step, secure data transfer and conversion based on initial on-site discovery and planning with GRREC accounting staff and leadership.
4. Step-by-step protocols/support for initial roll-out to GRREC staff and leadership, including but not limited to:
 - a. Expert training and support for key GRREC staff, including designated finance, leadership, and/or other staff as mutually determined by the Vendor and GRREC.
 - b. An option to train at the GRREC facility and to develop a core group of GRREC "experts" who can then onboard new and existing staff as needed.
5. Capable of preventing inappropriate/accidental spending of funds on an account-by-account basis as required by specific funding sources (e.g., indirect funds for contracts, unallowed travel, unallowed technology, food or other meeting expense, etc.).
6. Flexible graphics and/or formats to ensure end-users have friendly access to the system.

7. Accessibility through secure mobile applications.
8. Tools to ensure availability of reports and other information to support auditing and other reporting processes.
9. Ongoing maintenance and regular updates to ensure compliance, technology updates, and other needs.
10. Ability to add, eliminate and/or modify specific components of the software as the requirements of GRREC change (e.g., federal reporting requirements, audit requirements, staffing changes, etc.).
11. Appropriate data storage in a secure system and format.
12. Ongoing professional services for training of new and existing users as well as problem resolution throughout the life of the contract.
13. Seamless project management by the Vendor of the implementation, including scheduling, ongoing communications, training and support.
14. Demonstrated capacity to install an acceptable system and to convert existing data/accounts to the new system.
15. Integration of the system with a Grant Management/Data System that meets the points outlined below (Category 2), including the ability for real-time project budget review by grant staff and program managers.
16. Perpetual licensing offered through the Vendor and clear proprietary ownership of all data by GRREC.
17. Evidence of expertise in the implementation of accounting software and systems that serve the needs of nonprofits, educational institutions, and/or schools.
18. Sufficient customer base to demonstrate a sound track record in working with a wide range of entities (small, mid-sized, large organizations).
19. Simple, user-friendly short-cuts and links for non-accounting staff members who utilizing purchasing, budgeting or other appropriate modules.

Category 2: Grant Management Software

1. System integrates smoothly with the accounting software to ensure grant managers have access in real time to their budgets, including income levels and expenditures.
2. Secure platform/interface to provide individual program managers an ability to upload potentially confidential information related to teachers, leaders, students, and classroom.
3. Integrating with Outlook calendars and contacts for ongoing communication with grant participants in the field; enables project-supported emailing within project teams, classrooms, schools, etc.
4. Ability to tie back to the ongoing budget/expenditures and demonstrate federal outcomes relative to spending (i.e., outcomes aligned to funds expended).
5. Ability to upload data, data sets, and other information from within GRREC and from the field through participants to determine "what" happened within each project and, ultimately, why it happened (evaluator analysis).

6. Includes a user-friendly format with links designated for appropriate end users, including teachers, leaders, evaluators, researchers and GRREC staff.
7. Provide cross-project access to reporting and data, allowing GRREC leadership to begin analysis of ongoing trends/outcomes for a specific intervention, treatment, or strategy.
8. Grant Management System must "talk to" other GRREC systems, including accounting, personnel, etc.
9. Includes centralized storage space and easy-to-use portals for data gathering across multiple projects and programs but allowing multi-level review by project managers (project specific) and leadership (review of all data).
10. Utilizes on-screen dashboard for quick assessment of project progress, ongoing benchmarks, funds expended, data collected, etc.
11. Assurance that data remains the property of GRREC at all times and remains in a format that may be collected and secured by GRREC at all times.
12. Ability to maintain and support multiple users in various locations.
13. Training to ensure grant managers, evaluators and/or GRREC leadership are able to operate the software, communicate with schools/districts to collect data, etc.
14. Step-by-step protocols/support for initial roll-out to GRREC staff and leadership, including but not limited to:
 - a. Expert training and support for key GRREC staff, including designated finance, leadership, and/or other staff as mutually determined by the Vendor and GRREC.
 - b. An option to train at the GRREC facility and to develop a core group of GRREC "experts" who can then onboard new and existing staff as needed.

Attachment 5: Vendor Pricing Information
Accounting, Grant Management, and Data Collection System

Please provide specific pricing information related to your proposed bid. Provide both line-item detail and a summary of costs related to the system implementation, data storage and preparation, training, ongoing support, etc., as well as an executive summary of charges suitable for use with our committee and other individuals reviewing the bid.

Attachment 6: Vendor RFP Checklist
Accounting, Grant Management, and Data Collection System

Please indicate your compliance with the guidelines in this RFP by placing your initials in the space after each line on the following vendor RFP checklist. ***This checklist is not intended to be comprehensive. Each Vendor is responsible for completely reviewing their proposal and determining all factors necessary for submission of a comprehensive bid proposal.***

This checklist may be submitted in hard copy with initials provided in ink (black or blue) or submitted digitally via a scanned copy of the original document in .pdf format.

The proposal contains:

1. Cover or Title Page including RFP Reference Number _____ (please initial)
2. Cover letter _____ (please initial)
3. Table of Contents _____ (please initial)
4. Executive Summary _____ (please initial)
5. Completed Attachment 1: Vendor RFP Worksheet _____ (please initial)
6. Completed Attachment 2: GRREC Vendor Signature Page _____ (please initial)
7. Completed Attachment 3: Bidder's Qualifications Statement _____ (please initial)
8. Completed Attachment 4: Specifications (Fill-in: text-based) _____ (please initial)
9. Completed Attachment 5: Vendor Pricing Information _____ (please initial)
10. Proposal submitted in both hard copy and electronic copy (Microsoft Word and Microsoft Excel for corresponding RFP components) format. Electronic version shall be on CD or Flash Drive. _____ (please initial)
11. Proposal format shall not include elaborate fonts. _____ (please initial)
12. The proposal package contains the signatures of authorized representatives of the firm. _____ (please initial)
13. The proposal, submitted electronically, will be marked clearly be identified with all of the following:
 - a. Vendor's Name and Address _____ (please initial)
 - b. RFP Number _____ (please initial)
 - c. RFP Name _____ (please initial)
 - d. Proposal Due Date _____ (please initial)
 - e. Issuing Officer's Name _____ (please initial)
14. Proposal pricing to GRREC is as low or lower than pricing available to similar customers, pricing will remain so throughout the duration of the contract, and pricing reflects any and all discounts through appropriate associations and member groups. _____ (please initial)