

TOWN OF GREENWICH
PURCHASING DEPARTMENT
101 Field Point Road
Greenwich, CT 06830
203 622-7881

NO.: 7078 RFP

ISSUE DATE: 6/04/14

DEADLINE DATE: 6/26/14

DEADLINE TIME: 3:00 P.M.

 REQUEST FOR BID

 X REQUEST FOR PROPOSAL

PREBID CONFERENCE: _____

TIME AND DATE: _____

LOCATION: _____

ITEM/CATEGORY MANAGEMENT INFORMATION SOFTWARE (MIS) FOR SOCIAL SERVICES

LOCATION GREENWICH, CT

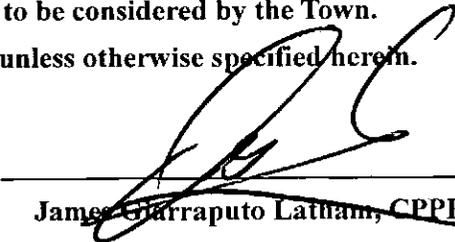
 PREQUALIFICATION

 X STANDARDS/SPECIFICATIONS (ATTACHED)

 X INSURANCE REQUIRED (SEE ATTACHED)

PLEASE NOTE:

1. Sealed Bids/Proposals are due at the Town of Greenwich Purchasing Department on date noted. NO bids/proposals will be accepted after the date and time specified above. Whether the bid/ proposal is sent by mail or commercial express service, the bidder/proposer shall be responsible for actual delivery of the bid/proposal to the PURCHASING DEPARTMENT before the deadline time. Bids/proposals received after the deadline time will not be considered. PLEASE CLEARLY INDICATE BID/PROPOSAL NUMBER ON LOWER LEFT-HAND CORNER OF ENVELOPE.
2. BIDS/PROPOSALS ARE NOT ACCEPTED BY FAX OR E-MAIL.
3. COMPANY NAME AND ADDRESS MUST CONFORM ON ALL DOCUMENTS INCLUDING INSURANCE DOCUMENTS. A POST OFFICE BOX ADDRESS IS NOT ACCEPTABLE.
4. Bid/Proposal number must appear on all bids and related correspondence.
5. The Town of Greenwich is exempt from Federal and State Taxes.
6. The Town will consider an alternate bid only if bidders have been permitted to provide an alternate bid. An alternate bid must be clearly identified as such in order to be considered by the Town.
7. Stated prices are to be FOB destination inside delivery, unless otherwise specified herein.
8. Terms and Conditions indicated on reverse.



James Garraputo Lattam, CPPB, Senior Buyer

An Affirmative Action/Equal Opportunity Employer, M/F/H

Terms and Conditions

Bidders shall familiarize themselves with all provisions of the specifications and shall not at any time after submitting bid, dispute any of the specifications or assert that there was any misunderstanding in regard to the furnishing and delivering of the items called for in the proposal.

The Town of Greenwich reserves the right to issue addenda as needed on bids/proposals.

The Town of Greenwich reserves the right to reject any and all bids not deemed to be in the best interest of the Town of Greenwich, or to accept that bid which appears to be in the best interest of the Town of Greenwich. The Town of Greenwich reserves the right to waive any informalities in or reject any or all bids, or any part of any bid.

References to a particular trade name or manufacturer's catalog or model number are made for descriptive purposes to guide the bidder in interpreting the requirements of the Town of Greenwich. They should not be construed as, nor are they intended to exclude proposals on other types of materials, equipment and supplies. However, the bidder, if awarded a contract will be required to furnish the particular item referred to in the specification or description unless a departure or substitution is clearly noted and described in the proposal.

Respondents shall provide one proposal and bidders one bid price for each specified required line item with no more than one total lump sum bid, unless allowed to do otherwise by the solicitation. Respondents shall provide no more than one bid reply unless allowed by the solicitation. Bidders shall not include in their prices any Federal or State taxes from which the Town of Greenwich is exempt.

The successful bidder/s shall indemnify the Town of Greenwich against all losses, claims, actions and judgments brought or recovered against the contractor or the Town of Greenwich.

No proposal shall be received from, or contract awarded to, any person, firm or corporation who is in default or in debt to the Town of Greenwich for non-performance of any contract, or who is a defaulter as surety or otherwise from any obligation to the Town of Greenwich.

Bids must be signed in ink by the vendor. No bids shall be made in pencil. Any bids showing any erasures or alterations must be initialed by the bidder in ink. Failure to sign and give all information requested in the proposal may result in the bid being rejected.

Quantities as listed on the bid sheets are estimated for bidding purposes only. Award of contract shall be for the quantities actually ordered as needed during the contract period. However, the Town of Greenwich reserves the right to increase or decrease the quantities by 10%.

Unit prices quoted shall be net exclusive of all taxes, and must include all transportation, delivery and unloading costs; fully prepaid F.O.B. destination in place inside delivery. Debris, if any, removed.

The Town of Greenwich reserves the right to make awards on an item by item, total or lump sum basis. Where an award is made on an item by item basis, the unit price prevails. The Town reserves the right to make award in best interest of its own operation. All awards are contingent upon certification by the Town Comptroller that funds are available in appropriate accounts.

It is understood that prices shall hold firm and prevail for the actual quantities required or ordered as needed during the life of the contract whether more or less than estimated quantities. Unit prices shall not be subject to any increase during the life of the contract.

All deliveries are to be made within the time period specified in the bid proposal upon receipt of written purchase order or authorized verbal requests except as may be otherwise arranged by Supplier and Purchaser. Receipt of contract is not authority to ship. Emergency deliveries are to be made within twenty-four (24) hours from receipt of a telephone request from the Director of Purchasing and Supply. All deliveries are to be made on business weekdays between the hours of 9:00 A.M. and 4:00 P.M. except as may be otherwise arranged by the Supplier and Purchaser.

In the event deliveries are not made as specified to a Town delivery point, the Director of Purchasing and Supply shall reserve the right to purchase any such bid item on the open market and to charge any increase in price paid over the current contract price to the account of the vendor.

All bids will be awarded or rejected within sixty (60) days of bid opening date or for the stated period of validity, if different. Therefore, bidder agrees that prices will remain firm for acceptance for that period.

The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex or national origin. The contractor, however, will take affirmative action to insure that minority group members are employed and are not discriminated against during employment. Such actions shall include, but not be limited to the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection of training, including apprenticeship.

The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, religion, color, sex or national origin. The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract of understanding, a notice advising the labor union or worker's representative of the contractors' commitments under this specification and under rules, regulations and orders promulgated by the State.

"Affirmative Action" means procedures which establish hiring and employment goals, timetables, and practices to be implemented, with good faith efforts, for minority group members.

"Minority Group Members" as identified in EEO-4 reports shall mean Black, Hispanic, Asian or Pacific Islanders, American Indian, and Alaskan Natives.

The contractor or subcontractor offers and agrees to assign to the public purchasing body all right, title and interest in and to all causes of action it may have under Section 4 of the Clayton Act, 15 U.S.C. Section 15, or under Chapter 624 of the General Statutes of Connecticut, arising out of the purchase of services, property or intangibles of any kind pursuant to a public purchase contract or subcontract. This assignment shall be made and become effective at the time the public purchasing body awards or accepts such contract, without further acknowledgment by the parties.

TOWN OF GREENWICH

REQUEST FOR PROPOSAL #7078 DEADLINE: 6/26/14 AT 3:00 PM

MANAGEMENT INFORMATION SOFTWARE (MIS) FOR SOCIAL SERVICES

BACKGROUND

The Town of Greenwich Purchasing Department on behalf of the Greenwich Department of Social Services (GDSS) is soliciting proposals from software solution providers for the purchase and implementation of management information software system.

GDSS has served Greenwich residents for over 100 years. The Department provides services to those residents that are in need of basic human services such as: housing, food, clothing, personal safety and health care. The primary function of the department is case management, serving as a “bridge” linking clients with the appropriate services in the community. Case managers assist clients in meeting emergent needs and long-term self-sufficiency. The department also provides direct services such as, homemaker services, escorted transportation and an after-school program.

GDSS has been operating with a management information software program for over 12 years. During this time, the program has undergone one significant re-design and each year numerous program upgrades were implemented as they became available. Unfortunately, after years of continuous use the architecture has become rigid and numerous “patch-work fixes” to the system has made it cumbersome and slow. Questions concerning its overall efficacy led to a consultant’s review of the system.

The consultant’s recommendation was to replace the current system with one that is more directly in line with the specific needs of the department.

Description of Current System:

In 1999, The Greenwich Department of Social Services (GDSS) concluded that it needed an electronic management information system to create a more efficient and effective environment for serving its client base and providing accountability to the Town.

GDSS required an information management system that gathered, analyzed and disseminated information to support its program operations. After a review of several programs, DeFran’s Evolv –CS system was selected, a contract was signed and the program implemented in 2001.

The Evolv-CS was designed over two decades ago to be a completely integrated Electronic Health Record (EHR) software system with comprehensive case, clinical and financial management system for the human services industry. Its EHR was designed to operate in an array of programs, in various treatment settings, across the entire continuum of care.

The vendor describes the current system as:

“A fully integrated, web-based EHR software system designed to meet the needs of the human services industry. The software provides a robust, comprehensive, set of case, clinical, and financial management features for providers who operate in a wide array of programs and treatment settings and across the entire continuum of care.”

Initially, Evolv-CS was a software system designed to be flexible enough to handle the entire continuum of care for any Human Services agency, regardless of size, geographic coverage and diversity of program and service lines. Over time, this “one size fits all” approach proved to be a double-edged sword. As its size grew, the configuration became more complicated and restrictive as evidenced by the following:

- Lacks ease-of-use in its editing functionality
- Users are forced to re-enter data and error rate increases
- Program design shows signs of questionable logic - Must enter redundant information when setting up service plan as you move to other nested subcategories

After operating with this system for over twelve years the Department has concluded:

- The software has fallen so far behind that it runs on archaic architecture, standards and code
- The “one size fits all” approach became too complicated, rigid and restrictive
- Software shifted over to serving the needs of the health sector and less to case management area
- Software does not perform tasks in a way that makes sense to organization; not able to work with software for it to conform with organization’s needs
- Unable to convert data/information into customized reports

Evolv-CS does not perform many tasks in a way that makes sense to GDSS. The “user-friendly” software interface that may have, at one time, been customizable is no longer the case. Customer service has deteriorated over the years. If a problem could be resolved by simply configuring the software to accommodate GDSS, instead DeFran/Netsmart waits until there is considerable negative user feedback and then releases an “update or change” to Evolv-CS. Rather than focusing on product design or the re-engineering of the “guts” of the program, the vendor “bolts on” scripts or macros to resolve reported problems. This approach creates more code that incurs considerable overhead at the cost of application efficiency and performance.

GDSS is at a critical juncture in its operation of the Evolv-CS system. Staff has provided feedback that the Evolv-CS system is cumbersome and slow and there are questions about the overall efficacy of the system. Recently DeFran was acquired by another software company, Netsmart, who continues to support the Evolv-CS program.

A consultant team hired to evaluate the Evolv-CS program recommended to GDSS that “Evolv-CS be maintained as long as it takes to deploy a replacement system.” It is the intent of GDSS to move to another software application.

Description of Ideal MIS:

- A software system designed for Social Services department's case management and homemaker service.
- Flexible, adaptable that guides the user through data entry requirements.
- Step by step screens or tabs that correspond to required customer information for each program; such features reduce data-entry errors and inconsistencies.
- Redundant information migrates to the next screen.
- Keeps track of case manager's tasks and provides pop-up reminders about those that are time sensitive.
- Analyzes client information and suggest additional programs or services. EX: MIS determines client is eligible for transportation assistance and prompts the case manager to provide information to the client. All in one service plan that integrates the needs assessment and has a design that allows for goals, objectives, progress notes and time lines.
- Supports case manager by producing necessary reports used for program requirements, participant outcomes and information on staff performance.
- Reports on outcomes and service histories aid case manager in determining best course of action and areas the client may refocus efforts to achieve goals outlined in the individual's service plan.
- Provides administration and supervisors with reports, such as dashboards, that maintain/track key metrics for the organization. Data on case manager's productivity to better understand case manager's workloads, strengths and areas for improvement.

TERMS AND CONDITIONS

In addition to the Town's standard terms and conditions that appear on the reverse side of the cover sheet, the following will also apply to this RFP:

Issuing Authority

Mr. James Giarraputo Latham, CPPB, Senior Buyer has been designated to be responsible for the conduct of this procurement. Any inquiries or requests regarding this procurement must be submitted in writing to Mr. Latham to the address below by:

June 17, 2014 at 11:00AM.

Town of Greenwich
Purchasing Department
101 Field Point Road
Greenwich, CT 06830

Fax: (203) 622-7776
Email: jlatham@greenwichct.org

Issuance of Addenda

The Town of Greenwich reserves the right to amend this solicitation by addenda. Addenda will be posted to the Town's website (www.greenwichct.org/bids) up to 48 hours in advance of the bid/proposal's due date and time. **It is the bidder's responsibility to check the Town's website for addenda.** If in the Town's opinion revisions are of such a magnitude, the deadline for this solicitation may be extended in an addendum. In addition, addenda can change specifications, reply sheets, and times and dates for prebid meetings as well as due dates/deadlines for questions and bids/proposals. **No notification of addenda issuance will be made other than on the Town's website.**

Taxes

The Town of Greenwich is exempt from the payment of taxes imposed by the federal government and or state of Connecticut, and such taxes shall not be in the prices.

Packaging

Each proposal must be sealed to provide confidentiality of the information prior to the submission date and time. The Town will not be responsible for premature opening of proposals not properly labeled.

Proposal & Demonstration Costs

The respondent shall be responsible for all costs incurred in the development and submission of the proposal.

In addition, selected respondents (the finalists) may be required to present their proposals to the evaluation committee in Greenwich. The presentations will include a demonstration of the product, simulating the setup and operation of key functions and reports.

The costs of the presentations and the costs of transportation to and from Greenwich shall be borne solely by the finalists.

State, Local and Federal Laws

The respondent shall acknowledge and agree that, should it be awarded the Contract, it shall be solely responsible for strict compliance with all federal, state and local statutes, laws, codes, rules, regulations and ordinances, and for the procurement and maintenance of all necessary licenses and permits relating to the performance of services.

Applicable Law

The laws of the State of Connecticut shall govern this Contract and any and all litigation related to this Contract. In the event of litigation related to this Contract, the exclusive forum shall be the State of Connecticut and the exclusive venue for such litigation shall be the Judicial District for Stamford/Norwalk at Stamford.

Contract Format

The Town of Greenwich has included, for reference by the respondents, **Exhibit C**, Personal Service Contract, the contract format that will be used for this procurement.

The initial term of the contract shall be one year. In addition there will be four option years that may be engaged upon the mutual consent of both parties on an annual basis.

Execution of Agreement

The vendor whose proposal is accepted will be required and agrees to duly execute the 'agreement' and furnish the required contract bonds and insurance certificates within ten (10) days after award of the contract.

Cancellation of Award/Contract

If vendor fails to perform or observe any material term or condition of this Agreement and such failure continues for thirty (30) days after vendor's receipt of written notice, The Town of Greenwich may cancel the order without liability for cancellation/termination charges.

Proposal Inclusions

All equipment, accessories, labor, and materials must be furnished for the installation of all of the services and systems specified. Any additional materials or equipment necessary for the successful implementation of this contract but not specified or described herein will be deemed to be part of these specifications.

Withdrawal of Bids (Or Proposals) Prior to Deadline

A bidder wishing to withdraw a bid/proposal prior to the deadline may do so by preparing a formal written request on company letterhead. The person who signs the letter must be the same person who signs the reply sheets. The Town will verify that the signature on the letter matches the signature on the reply sheets.

The Town will also verify the request to withdraw the bid/proposal by calling the bidder at the telephone number supplied on the reply sheets.

After the Town is satisfied that a request to withdraw a bid/proposal before the established deadline is valid, the bid/proposal will be returned to the bidder. The bidder may then withdraw completely from the bidding process, or may modify the bid/proposal and resubmit before the deadline.

Withdrawal of Bids (Or Proposals) After the Deadline

If bid security is required and a bidder does not honor his/her bid for the specified time, the bid check shall become the property of the Town; or, if a bid bond was furnished, the bid bond shall become payable to the Town.

After the bid/proposal deadline has passed, the submitted bids/proposals become the property of the Town and are valid offers to be honored by the bidder for sixty (60) days or longer, as specified in the Request for Bid/Proposal.

Bidders who do not honor their bids/proposals for the sixty (60) day (or as specified) period, shall be declared irresponsible bidders.

Insurance Requirements

The **Acord certificate of insurance form** must be executed by your insurance agent/broker and returned to this office. The most current Acord form should be used for insurance documentation purposes. Company name and address must conform on all documents including insurance documentation. It is required that the agent/broker note the individual insurance companies providing coverage, rather than the insurance group, on the Acord form. The Contract number (provided to the awarded Contractor), project name and a brief description must be inserted in the "Description of Operations" field. It must be confirmed on the Acord Form that the Town of Greenwich is endorsed as an additional insured by having the appropriate box checked off and stating such in the "Description of Operations" field.

A letter from the awarded vendor's agent/broker certifying that the Town of Greenwich has been endorsed onto the general liability policy as an additional insured is also mandatory. This letter must follow exactly the format provided by the Purchasing Department and must be signed by the same individual authorized representative who signed the Acord form, both of which must be signed with original ink "wet" signatures. If the insurance coverage required is provided on more than one Acord certificate of insurance, then additional agent/broker letters are also required. Contract development will begin upon receipt of complete, correct insurance documentation.

The Contractor shall be responsible for maintaining the above insurance coverages in force to secure all of the Contractor's obligations under the Contract with an insurance company or companies with an AM Best Rating of B+:VII or better, licensed to write such insurance in Connecticut and acceptable to the Risk Manager, Town of Greenwich. For excess liability only, non-admitted insurers are acceptable, provided they are permitted to do business through Connecticut excess line brokers per listing on the current list of Licensed Insurance Companies, Approved Reinsurers, Surplus Lines Insurers and Risk Retention Groups issued by the State of Connecticut Insurance Department.

The vendor should submit with the proposal the signed, original "**Insurance Procedure**" form, **page 21**, which states that the vendor agrees to provide the specified insurance coverage for this proposal at no additional charge above any insurance charge declared in the bid.

PRODUCT SPECIFICATIONS

The software provided by the contractor shall meet all of the following requirements:

System Functionality

- Web-based, tablet and smart phone accessible
- Provides visual prompts for clear, intuitive navigation flow
- Clearly identified field labels and other application content
- Application features accessible without repetitive clicks
- Ability to search by any field (DOB, phone #, SS#, etc...), record numbers associated with the case (client ID), merge data and run reports on caseload
- Identifies and notifies user of incorrect input errors and incomplete information
- Each screen shares a common organization and set of styles for consistency & continuity
- Has help function –easy to follow and understand
- Auto save function
- No repetitive data input– information migrates
- Keyword searching

Case Management

- Comprehensive Scheduling system that includes: ability to set different dates and types of appointments, attended and missed appointments, allow to update or change, reminder prompt
for clients not seen and client specific state and federal benefits
- Integrated Service Plan that includes: Demographics, budget sheet/calculator and Intake information, referral tracking, and one document that links need(s), goals, objectives, progress notes, timelines, and discharge status
- Organize clients by selected need categories

Ability to:

- Make queries on caseload information
- Link documents to case files, including scanning documents
- Track relationship of family members and allows multiple contacts to be associated with client's record
- Add new client and family members with all identifiers and demographic information
- Track applicants/admissions and discharges and view in multiple programs
- Editing tools, including spell check, highlighting, etc...
- Track services and any financial assistance provided to client
- Provide advanced notification of task(s) due and relay overdue tasks meeting threshold to supervisor
- Provide results- based outcomes

Configuration and Customization

- Ability to create and modify letter templates
- Mail merge for client mailing labels
- Create and/or modify forms
- Scan documents and file with easy retrieval
- E-Mail to client groups based on query

Reporting

- Offers a range of standard and custom reports to meet case manager and Administration needs
- monitor client progress and improve efficiency of department, must be accessible to users; charting tools, longitudinal reports, data comparison, budget and financial information, productivity report
- Outcome metrics – provide capability to support creation of outcome measures for each program
- Ability to replicate existing Department reports (monthly, quarterly annually)
- Modified service plan that can be provided to client

Security and Technical

- Back-up system - database back-up
- Protection from hardware/power failures
- Support for: Operating systems, databases, web browser, development language
- Security set at different levels – Administration, supervisor, staff
- Confidential caseload that only specified users may view
- Input and lock service notes to be read as needed with tracking security
- Cloud availability
- HIPPA Compliant
- Ability to re-set password by user

Implementation

- On-site training
- web-based training
- Training for new upgraded versions
- Training manual
- Consistent service updates

Architecture

- Operate on SQL Server 2008
- Windows 2003 or greater operating system
- Operate in a virtual machine environment
- Web technology – NET 2.0 or greater, XML – must be installed in virtual directory and not dependent on installation in the “default” directory
- Operate with a “distributed architecture” environment for real-time transactions between the sites and centralized database
- Operate on 2.13GHz with 4GB memory and XP pro-minimum
- Operate the system from an off-site location utilizing laptops via web or Citrix connection during recovery operations after a natural disaster
- Web-based solution accessible via web-browser over network
- Supports XML, with defined data schemas (XSD) used as the format for data transport
- Active directory for authentication of users to support single-sign-on mechanisms
- Ability integrate with other solutions and applications (Inventory and vendor tracking)
- Provide 24x7 system availability
- To enable integration, contractor system must allow exchange through web services exposed to the external system or must allow deployment of special lightweight package of triggers within system database schema and stored procedures in separate schema
- Provide capability to be able to expose required functionalities as web services
- Provide capability to enable to consume external web services (such as Client Identity service, Address Validation service, etc...)
- Provide capability to be able to authenticate users through external authentication source

Professional Services

- Vendor must be able to convert data from existing database to new system
- Capacity to easily change workflows
- Keyword searching
- Compliant with Disabilities Act Section 508

SCOPE OF WORK

The contractor shall provide the Town with the following services:

- 24/7 email support
- 24X7 phone support for catastrophic events/ situations
- 24X7 support via web-based incident and task tracking system with full audit and history
- Response with acknowledgment of request within 2 hours and provide support within 24 hours
- Documentation related to proof of their disaster recovery plan and the testing plan with the frequency of testing
- Hosting site visits by authorized individuals
- Training on the software to the 55 users. The minimum training time will be 8 hours per person depending upon the worker's role.
- Installation assistance for the software on all computers. The minimum installation assistance will be five (5) hours. This may be performed consecutively (not concurrently) with the training time.

- Conversion of data from existing MS SQL server databases to the new system

Contractor's Minimum Qualifications

The contractor must meet the following minimum requirements:

- The contractor must have a minimum of 5 years of successful experience providing similar software to other municipal or Not-For Profit customers.

- The contractor must have provided the proposed software to at least 25 other Not-for-Profit human services organizations or municipalities within the past 10 years.

PROJECTED CALENDAR OF EVENTS

The table below provides respondents with an approximate schedule of the key events of this project:

| KEY EVENT | APPROXIMATE DATE |
|-------------------------------------|-------------------------|
| Contract finalized | October 1, 2014 |
| Training in process | December 1, 2014 |
| Setup and configuration of software | December 1, 2014 |
| Training completed | January 15, 2015 |

PROPOSAL FORMAT & REQUIREMENTS

The respondent shall deliver one complete original proposal, and three (3) complete copies of the proposal to the Purchasing Department before the deadline. Respondents should also include one CD or Flash Drive containing a PDF of the complete original proposal.

At the very beginning of the proposal, the respondent should include a letter of transmittal signed by an individual authorized to bind the contractor.

The respondent should repeat each of the following questions, followed by the answer and/or form. Answers should be concise, but complete. Respondents are expected to respond specifically to each question in this section. Failure to respond to all applicable questions and form requirements in this section may result in rejection of the proposal.

1. State the firm's full company name and home office address. Describe the organizational structure. List the name and occupation of those individuals serving on the organization's Board of Directors, and list the name of any entity or person owning 10% or more of the organization. Explain if the firm **meets the Town's minimum qualifications**.
2. List the name, title, mailing address, telephone number, facsimile number and email address of the contact person for this proposal. The contact person must be authorized to sign this contract for the firm.
3. The respondent shall provide a summary of the firm's work history (including client's names and the number of years of experience) providing software solutions.
4. The respondent shall clearly explain and provide examples of how and when the firm has successfully delivered the specified services to other customers. The respondent shall provide a list with contact information of twenty-five (25) Not-For-Profit customers that have utilized the proposed system.
5. The respondent shall clearly and completely explain if and how the proposed product **meets the Town's description of ideal MIS**.
6. The respondent shall clearly and completely explain if and how the proposed product **meets all of the Town's product's specifications**.
7. The respondent shall explain what features and attributes distinguish the firm and the proposed product from their competitors.
8. The respondent shall comment on the proposed timetable and discuss how the firm has the capability and capacity to **meet the Town's scope of work** and complete this project in a timely fashion.
9. The respondent shall complete and include the Reply Sheets in the proposal.
10. The respondent shall complete and include in the proposal the Insurance Procedure Form and the Statement of Qualifications Form.

EVALUATION PROCESS

Proposals and respondents will be evaluated using the following criteria:

| Criteria | Maximum Points |
|---|----------------|
| Functionality of proposed software | 40 |
| Level of experience & expertise of the firm & staff | 15 |
| Capability & capacity of firm to complete the project in a timely fashion | 15 |
| Ability of the firm to properly service the Town's needs | 15 |
| Proposed prices of services | 15 |
| Total | 100 |

The Town is planning for the Evaluation Committee to be comprised of the individuals listed below. The Town reserves the right to modify this list:

1. Lauren Rabin - Committee Chair
2. Alan Barry - DSS Commissioner
3. Monica Bruning - DSS Director of Admissions and Applications
4. Tom Klein - Town IT Director
5. Nestor Nana - DSS Contracts/Systems Manager
6. Martha Reyes - DSS Business Office Supervisor
7. Patricia Schumacher - DSS case Manager

The Evaluation Committee members will read and grade (privately and individually) all responsive proposals based on the evaluation criteria specified in this RFP. Each respondent will be ranked by the Senior Buyer based on the Evaluation Committee's scores of the proposals. The highest ranked respondents will be identified as finalists.

The finalists may be interviewed by the Evaluation Committee: the interviews/demonstrations will be graded and the finalists will be ranked based on the grades they receive for the interviews/demonstrations.

The financial strength of the highest ranked finalist(s) and the results of reference checks may also be considered during the evaluation process. In addition, exceptions raised by the highest ranked finalist (if any) will need to be reconciled to the mutual satisfaction of both parties.

If the Town elects to make an award for this project, the highest ranked responsive, responsible finalist will receive the award.

Observers & Advisors

The Town may elect to have others serve as observers and advisors during the evaluation process.

The observers and advisors will be permitted to read the proposals of the finalists; will be permitted to attend the interviews; and will be permitted to ask questions at the interviews. However, the observers and advisors will not be permitted to grade the proposals or the interviews/demonstrations.

TOWN OF GREENWICH

REQUEST FOR PROPOSAL #7078 DEADLINE: 6/26/14 AT 3:00 PM

MANAGEMENT INFORMATION SOFTWARE (MIS) FOR SOCIAL SERVICES

REPLY SHEET (Page 1 of 5)

PRICING

The respondent shall provide complete pricing below that shall remain fixed for the duration of the initial term of the contract:

| ITEM | TOTAL PRICE |
|--|--------------------|
| Furnish and install product software that meets all of the Town's specifications for 55 users. | \$ _____ |
| Provide all specified technical support | \$ _____ |
| Provide all specified training | \$ _____ |
| Total Lump Sum Price | \$ _____ |

Respondent's Company Name: _____

Authorized Signature: _____

TOWN OF GREENWICH

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MANAGEMENT INFORMATION SOFTWARE (MIS) FOR SOCIAL SERVICES

REPLY SHEET (Page 2 of 5)

PRICING IN OPTIONAL YEARS

The respondent shall indicate below if pricing may either increase or decrease prior to the start of the optional years of the contract. Pricing shall remain fixed for the duration of each annual term.

_____ Yes, pricing may increase or decrease in the option years.

_____ No, pricing will not increase or decrease in the option years.

If pricing may increase or decrease in the option years, respondent shall indicate below the maximum percentage of the potential increases or decreases for each optional year.

| <u>OPTION YEAR</u> | <u>Max Price Increase</u> | <u>Max Price Decrease</u> |
|--------------------|---------------------------|---------------------------|
| 1 | _____ % | _____ % |
| 2 | _____ % | _____ % |
| 3 | _____ % | _____ % |
| 4 | _____ % | _____ % |

Respondent's Company Name: _____

Authorized Signature: _____

TOWN OF GREENWICH

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MANAGEMENT INFORMATION SOFTWARE (MIS) FOR SOCIAL SERVICES

REPLY SHEET (Page 4 of 5)

Non-collusion Language

In submitting this bid/proposal, the undersigned declares that this is made without any connection with any persons making another bid/proposal on the same contract; that the bid/proposal is in all respects fair and without collusion, fraud or mental reservation; and that no official of the Town, or any person in the employ of the Town, is directly or indirectly interested in said bid/proposal or in the supplies or work to which it relates, or in any portion of the profits thereof.

Compliance with Ethics Code

In submitting this bid, the undersigned further declares that it has not, and will not, induce or attempt to induce any Town of Greenwich employee or officer to violate the Greenwich Code of Ethics in connection with its offer to provide goods or services under, or otherwise in the performance of, such contract.

The undersigned further understands that the above declarations are material representations to the Town of Greenwich made as a condition to the acceptance of the bid/proposal. If found to be false, the Town of Greenwich retains the right to reject said bid/proposal and rescind any resulting contract and/or purchase order and notify the undersigned accordingly, thereby declaring as void said bid/proposal and contract or purchase order.

RESPONDENT'S COMPANY NAME _____

ADDRESS _____

TELEPHONE # _____ **FAX #** _____

E-MAIL ADDRESS _____

WEB SITE _____

AUTHORIZED SIGNATURE _____

PRINT NAME _____

TITLE _____

STATE OF CT TAXPAYER ID # _____

FEDERAL TAXPAYER ID # _____

INCORPORATED IN THE STATE OF _____ **Corporate Seal** **Yes** **No**

TOWN OF GREENWICH

REQUEST FOR PROPOSAL #7078 DEADLINE: 6/26/14 AT 3:00 PM

MANAGEMENT INFORMATION SOFTWARE (MIS) FOR SOCIAL SERVICES

REPLY SHEET (Page 5 of 5)

NON- COLLUSION LANGUAGE CONTINUED

The Greenwich Code of Ethics can be found at www.greenwichct.org. Relevant provisions of the Code of Ethics state as follows:

2. **DEFINITION.** (1) Indirect interest, without limiting its generality, shall mean and include the interest of any subcontractor in any prime contract with the town and the interest of any person or his immediate family in any corporation, firm or partnership which has a direct or indirect interest in any transaction with the town. (2) Substantial financial interest shall mean any financial interest, direct or indirect, which is more than nominal and which is not common to the interest of other citizens of the town. (3) Town officer shall mean and include any official, employee, agent, consultant or member, elected or appointed, of any board, department, commission, committee, legislative body or other agency of the town. (4) Transaction shall mean and include the offer, sale or furnishing of any real or personal property, material, supplies or services by any person, directly or indirectly, as vendor, prime contractor, subcontractor or otherwise, for the use and benefit of the town for a valuable consideration, excepting the services of any person as a town officer.
3. **GIFTS AND FAVORS.** No town officer or his immediate family shall accept any valuable gift, thing, favor, loan or promise which might tend to influence the performance or nonperformance of his official duties.
4. **IMPROPER INFLUENCE.** No town officer having a substantial financial interest in any transaction with the town or in any action to be taken by the town shall use his office to exert his influence or to vote on such transaction or action.

By signing below, the undersigned declares that he/she has read the non-collusion language contained herein and agrees to abide by its contents:

AUTHORIZED SIGNATURE: _____

PRINT NAME: _____

RESPONDENT'S COMPANY NAME: _____

STATEMENT OF PROPOSING COMPANY'S QUALIFICATIONS

Company Name _____

Address _____

Phone Number _____

When organized _____

State of incorporation _____

How many years has company been engaged in business related to this proposal under the present company's name: _____

Contracts now in hand (gross amount) _____

Company officers _____

Have you ever defaulted on a contract or failed to complete a contract within the specified time?

Yes No

If so, please explain: _____

Respondent agrees proposed prices will remain firm for _____ days.

AUTHORIZED SIGNATURE _____

PRINT NAME _____

TITLE _____

TEL. NO. _____

TAXPAYER IDENTIFICATION NO. _____

TOWN OF GREENWICH
INSURANCE PROCEDURE

PLEASE NOTE:

RETURN THIS COMPLETED FORM WITH YOUR BID/PROPOSAL. FAILURE TO DO SO MAY RESULT IN YOUR BID/PROPOSAL BEING REJECTED.

Please take the insurance requirements of the Contract to your agent/broker immediately upon receipt of the bid documents to determine your existing coverage and any costs for new or additional coverage required for the work noted in this Request for Bid/Proposal. Any bids/proposals which contain exceptions to the insurance requirements may be considered nonresponsive and may be rejected.

STATEMENT OF VENDOR:

I have read the insurance requirements for this work and have taken the documentation to my insurance agent/broker. The bid/proposal cost reflects any additional costs relating to insurance requirements for this work.

If I am awarded this contract, I or my insurance agent shall submit all of the required insurance documentation to the Town of Greenwich Purchasing Department within ten (10) days after the date of the award of the contract.

Signature

Date

Contractor

Insurance Requirement Sheet

EXHIBIT A

Insurance Requirements: Before starting and until final completion and acceptance of the work called for in the Contract and expiration of the guarantee period provided for in the Contract, the Contractor and its subcontractors, if any, shall procure and maintain insurance of the types and amounts checked in paragraphs A through F below for all Contract operations.

- A. **General Liability, with minimum coverages for combined bodily injury and property damage liability of \$2,000,000 general aggregate, \$1,000,000 per occurrence including:**
- 1. **Commercial General Liability.**
 - 2. **Town as additional insured.**
 - 3. **Owners and Contractors Protective Liability (separate policy in the name of the Town).**
- B. **Comprehensive Automobile Liability, with minimum coverages of \$1,000,000 combined single limit for bodily injury and property damage, including, where applicable, coverage for any vehicle, all owned vehicles, scheduled vehicles, hired vehicles, non-owned vehicles and garage liability.**
- C. **Excess Liability, with minimum coverage of \$5,000,000 in umbrella form, or such other form as approved by Town Department Head and Risk Management Director.**
- D. **Workers' Compensation and Employer's Liability, with minimum coverages as provided by Connecticut State Statutes.**
- E. **Professional Liability (for design and other professionals for Errors and Omissions), with minimum coverage of \$2,000,000. If the policy is on a claims-made basis, coverage shall be continually renewed or extended for three (3) years after work is completed under the Contract.**
- F. **Other (Builder's Risk, etc.): _____.**
- G. **CERTIFICATE HOLDER: TOWN OF GREENWICH
ATTN: PURCHASING DEPT. (Also fill in on ACORD Certificate of Insurance)
101 Field Point Road, Greenwich, CT 06830.**

The Acord certificate of insurance form must be executed by your insurance agent/broker and returned to this office. The most current Acord form should be used for insurance documentation purposes. Company name and address must conform on all documents including insurance documentation. It is required that the agent/broker note the individual insurance companies providing coverage, rather than the insurance group, on the Acord form. The Contract number (provided to the awarded Contractor), project name and a brief description must be inserted in the "Description of Operations" field. It must be confirmed on the Acord Form that the Town of Greenwich is endorsed as an additional insured by having the appropriate box checked off and stating such in the "Description of Operations" field. A letter from the awarded vendor's agent/broker certifying that the Town of Greenwich has been endorsed onto the general liability policy as an additional insured is also mandatory. This letter must follow exactly the format provided by the Purchasing Department and must be signed by the same individual authorized representative who signed the Acord form, both of which must be signed with original ink "wet" signatures. If the insurance coverage required is provided on more than one Acord certificate of insurance, then additional agent/broker letters are also required. Contract development will begin upon receipt of complete, correct insurance documentation.

The Contractor shall be responsible for maintaining the above insurance coverages in force to secure all of the Contractor's obligations under the Contract with an insurance company or companies with an AM Best Rating of B+:VII or better, licensed to write such insurance in Connecticut and acceptable to the Risk Manager, Town of Greenwich. For excess liability only, non-admitted insurers are acceptable, provided they are permitted to do business through Connecticut excess line brokers per listing on the current list of Licensed Insurance Companies, Approved Reinsurers, Surplus Lines Insurers and Risk Retention Groups issued by the State of Connecticut Insurance Department.

**AGENT/BROKER
(LETTERHEAD)**

(Date)

Town of Greenwich
Joan T. Sullivan, Director of Purchasing
101 Field Point Road
Greenwich, CT 06830

Re: **(Name of the Insured)**
Town of Greenwich Contract No. XXXX

Dear Mrs. Sullivan:

The undersigned hereby certifies as follows:

- (1) I am a duly licensed insurance agent under the laws of the State of **[insert state]** and an authorized representative of all companies affording coverage under the Acord form submitted herewith;
- (2) The Town of Greenwich has been endorsed as an additional insured under general liability policy no. **[insert policy number]**, issued by **[insert company affording coverage]** to **[name of insured]**;
- (3) The general liability policy referenced in paragraph (2) above meets or exceeds the coverage in Commercial General Liability ISO form CG 00 01 10 01, including contractual liability;
- (4) The policies listed in the Acord form submitted to the Town of Greenwich in connection with the above referenced contract have been issued to the insured in the amounts stated and for the periods indicated in the Acord form; and
- (5) The Town of Greenwich shall be given thirty (30) days prior written notice of cancellation, lapse or restrictive amendment (except ten days notice of nonpayment) of the policies listed in the Acord form.

Sincerely,

(Signature)

Type Name
Authorized Representative for all companies listed in the Acord form

PERSONAL SERVICE CONTRACT

Contract No.

THIS AGREEMENT made and entered into this _____ day of _____ 2014, by and between the TOWN OF GREENWICH (hereinafter referred to as "Town"), acting herein by the undersigned official, and _____ (hereinafter referred to as "Contractor"), whose principal office is located at _____, acting herein by _____ its _____, hereunto duly authorized,

WITNESSETH:

WHEREAS, the Town contemplates:

WHEREAS, the Town desires to retain the services of the Contractor to perform the following work:

NOW THEREFORE, in consideration of the mutual covenants and agreements herein contained, the parties agree as follows:

- 1. Describe services to be performed:

- 2. Describe method and terms of payment:

This agreement consists of:

Personal Service Contract form (pp. 1-7);

Exhibit A, Insurance Requirements & Certificate of Insurance (pp. XX-XX);

Other exhibit(s) (yes/no) entitled _____ (pp. _____);

Other attachment(s) (yes/no) entitled _____ (pp. _____);

for a total number of _____ numbered pages (hereinafter collectively referred to as "Contract").

3. Any conflict between this Contract and any invitation to bid, request for proposal, bid or response to request for proposal shall be resolved in favor of this Contract, with the exception that any provision of an invitation to bid, request for proposal, bid or response to request for proposal, that is attached as an Exhibit to this Contract, which Exhibit provides for a higher standard of obligation or service by Contractor, shall control as to the standard of obligation and service required of the Contractor and shall thereby supplement this Contract.

4. The Town may at any time, and for any reason, direct the discontinuance of the services and work contemplated under this Contract for a period of time. Such direction shall be in writing and shall specify the period during which the work shall be discontinued. The work shall be resumed on the dates specified in such direction, or upon such other date as the Town may thereafter specify in writing. The period during which such work shall have been discontinued shall be deemed added to the time for performance. Stoppage of work under this article shall not give rise to any claim against the Town.

5. The service and work contemplated under this Contract shall be completed in full on or before .

6. The Town may at any time and for any reason terminate this Contract by written notice specifying the termination date, which shall be not less than seven (7) days from the date such notice is given. In the event of such termination, services shall be paid for in such amount as shall compensate for the portion of the work satisfactorily performed prior to termination. Such amount shall be fixed by the Town after consultation with the Contractor and shall be subject to audit by the Town Comptroller. Termination under this section shall not give rise to any claim against the Town for damages for compensation in addition to that provided hereunder.

7. It is the intent of this Contract to secure the personal services of the Contractor or a duly authorized and competent representative(s) of the Contractor acceptable to the Town. Failure of the Contractor for any reason to make the personal service of such a person available to the Town to the extent necessary to perform the services required skillfully and promptly shall be cause for termination of this Contract.

8. The Contractor shall not assign this Contract without prior consent of the Town in writing.

9. In the event of death or disability of the principal of the Contractor, any qualified partner or associate of the Contractor may be authorized, at the option of the Town, to continue to perform and complete all the terms, covenants and provisions contained in this Contract.

10. If the Contractor has been delayed and as a result will be unable, in the opinion of the Town, to complete performance fully and satisfactorily within the time allowed therefor, the Contractor, upon submission of evidence of the cause of the delay, satisfactory to the Town, shall at the discretion of the Town, be granted an extension of time for performance equal to the period that the Contractor was actually and necessarily delayed.

11. When the Town shall have reasonable grounds for believing that a) the Contractor will be unable to perform this Contract fully and satisfactorily within the time fixed for performance, or b) a meritorious claim exists or will exist against the Contractor or the Town arising out of the negligence of the Contractor or the Contractor's breach of any provision of this Contract, then the Town may withhold payment of any amount otherwise due and payable to the Contractor hereunder. Any amount so withheld may be retained by the Town for such period as it may deem advisable to protect the Town against any loss and may, after written notice to the Contractor, be applied in satisfaction of any claim herein described. This provision is intended solely for the benefit of the Town. No person shall have any right against the Town or claim against the Town by reason of the Town's failure or refusal to withhold monies. No interest shall be payable by the Town on any amounts withheld under this provision. This provision is not intended to limit or in any way prejudice any other right of the Town.

12. The acceptance by the Contractor, his successors or assigns, of any payment made on the final requisition under this Contract, or of any final payment due on termination of this Contract, shall constitute a full and complete release of the Town from any and all claims, demands and causes of action whatsoever which the Contractor, his successors or assigns, have or may have against the Town under the provisions of this Contract.

13. The Contractor shall not assert any claim arising out of any supervisory act or omission by any agent, officer or employee of the Town in the execution or performance of this Contract against any such agent, officer or employee. The Contractor shall require each person supplying labor or materials to the Contractor to agree in writing to the Contractor not to make any claim against the Town, its officers, agents or employees by reason of such labor or materials, or by reason of any acts or omissions of the Contractor.

14. The Contractor shall indemnify and save harmless the Town and its officers, agents, servants and employees, from and against any and all claims, demands, suits, proceedings, liabilities, judgments, awards, losses, damages, costs and expenses, including attorneys' fees, on account of bodily injury, sickness, disease, death or other damages sustained by any person or persons injury or damage to or destruction of any property, directly or indirectly arising out of, relating to, or in connection with the work called for in the Contract, whether or not due or claimed to be due in whole or in part to the active, passive or concurrent negligence, fault, or contractual default of the Contractor, its officers, agents, servants or employees, any of its subcontractors, the Town, any of its respective officers, agents, servants, or employees and/or any other person or persons, and whether or not such claims, demands, suits or proceedings are just, unjust, groundless, false, or fraudulent, and the Contractor shall and does hereby assume and agrees to pay for the defense of all such claims, demands, suits and proceedings, provided, however, that the Contractor shall not be required to indemnify the Town, its officers, agents, servants, or employees, against any such damages occasioned solely by acts or omissions of the Town, its officers, agents, servants or employees, other than supervisory acts or omissions of the Town, its officers, agents, servants, or employees, in connection with the work called for in the Contract.

15. The Contractor shall take out and maintain during the life of this Contract the types and amounts of insurance as are set forth in the attached Exhibit A. Before commencing the work called for in this Contract, the Contractor shall furnish the Town with a completed certificate of insurance on the Acord form that is referenced in the attached Exhibit A evidencing such coverage.

16. Contractor agrees to comply in every respect with applicable State and Town laws, regulations and ordinances.

17. Contractor shall at all times be deemed to be an independent contractor and shall be wholly responsible for the manner in which it performs the services required of it by the terms of this Contract. Nothing herein contained shall be construed as creating the relationship of employer and employee or principal and agent, between the Town, its agencies, employees, agents and Contractor, its employees and agents. Contractor assumes exclusively the responsibility for the acts of its employees and agents as they relate to the services to be provided during the course and scope of their employment. Contractor, its agents and employees shall not be entitled to any rights and privileges of Town employees and shall not be considered in any manner to be Town employees.

18. The laws of the State of Connecticut shall govern this Contract and any and all litigation related to this Contract. In the event of litigation related to this Contract, the exclusive forum shall be the State of Connecticut and the exclusive venue for such litigation shall be the Judicial District for Stamford/Norwalk at Stamford.

Dated at Greenwich, Connecticut,
this _____ day of _____ 2014.

Witnessed by:

Witnessed by:

THE TOWN OF GREENWICH

By _____ L.S.

Its _____

THE CONTRACTOR

By _____ L.S.

Its _____

STATUTORY SHORT FORMS OF ACKNOWLEDGMENT

FOR AN INDIVIDUAL ACTING IN HIS OWN RIGHT:

STATE OF _____)
) ss: _____
COUNTY OF _____)

The foregoing instrument was acknowledged before me this _____ day of _____, by _____
(name of person acknowledged)

Notary Public
My Commission Expires:

FOR A CORPORATION:

STATE OF _____)
) ss: _____
COUNTY OF _____)

The foregoing instrument was acknowledged before me this _____ day of _____ 2014 by _____
name and title of officer/agent
of _____ a _____
name of corporation State or place of incorporation

corporation, on behalf of the corporation.

Notary Public
My Commission Expires:

FOR A PARTNERSHIP:

STATE OF _____)
) ss: _____
COUNTY OF _____)

The foregoing instrument was acknowledged before me this _____ day of _____, by _____
acknowledging partner or agent
partner (or agent) on behalf of _____, a partnership.
name of partnership

Notary Public
My Commission Expires:

BY ANY PUBLIC OFFICER, TRUSTEE, OR PERSONAL REPRESENTATIVE:

STATE OF _____)
) ss: _____
COUNTY OF _____)

The foregoing instrument was acknowledged before me this _____ day of _____, by _____
name and title of position

Notary Public
My Commission Expires: