

Request for Proposals



For Learning Management System

Release Date: April 12 2019

Proposal Due Date: May 13, 2019

Request for Proposal Notice:

Bluebonnet Trails Community Mental Health and Intellectual Developmental Disabilities Center d/b/a Bluebonnet Trails Community Services (BTCS) requests proposals for the provision of **a learning management system to provide administration, documentation, tracking, reporting and delivery of educational courses and training programs. The proposal should also contain a solution for the documentation, tracking, reporting and delivery of organizational policies and procedures.**

Objectives

Through the procurement of a robust learning management system for delivery, documenting and tracking of educational courses and trainings, BTCS seeks to improve management of its human resources development processes.

Service:

N/A

Background Information

BTCS is a local mental health and mental retardation authority in eight counties in central Texas with population density of 696,000 people and a land mass of 6,910 square miles. The primary office is located in Round Rock, Texas. BTCS receives federal and state financial assistance through performance contracts with Texas Department of State Health Services (DSHS), Texas Department of Aging and Disability Services (DADS), Texas Department of Assistive and Rehabilitative Services (DARS) and other related grant programs. BTCS has approximately 540 employees and 333 contractors.

Procedures for Submitting Proposals

Proposals will not be accepted via fax. Proposals must be sent electronically to the email address below. It is the responsibility of the Vendor for the proposal to be submitted to the Contracts Management office. The proposal is not considered received until it is in the possession of Contracts Management.

Email submission address: contracts@bbtrails.org

Proposal must be received no later than May 13, 2019, no later than 3:00 pm CST.

Proposals should be clearly marked as a response to the RFP.

All questions about this RFP Must be submitted in writing to dorothy.light@bbtrails.org prior to May 2, 2019 Any relevant Q and A questions will be posted to our website by May 6, 2019. th.

ADDITIONAL PROVISIONS:

Historically Underutilized Businesses

BTCS is committed to promoting full and equal opportunities for all businesses. In order for BTCS to promote these opportunities and as part of its good faith effort, it is important to identify Historically Underutilized Businesses (HUB). HUBs are defined as for-profit corporation, sole proprietorship, partnership, or joint venture in which 51% of all classes of the shares of stock or other equitable securities are owned by one or more persons have been historically underutilized (socially disadvantaged) because of their identification as members of the following groups; Black American, Hispanic American, Asian American, Pacific American, Native American, and Women.

These persons must have a proportionate interest and demonstrate active participation in the control, operation, and management of the business.

Proposal Respondents must include answers to the HUB questionnaire included in this RFP.

Assignment

No right, interest or obligation in or under this contract shall be assigned or transferred by the Vendor without the express written consent of BTCS. Any attempted assignment or transfer by the Vendor without such consent shall be considered failure of contractual obligations and BTCS will reserve the right for immediate cancellation.

Applicable Law, Venue

This contract shall be governed, construed and interpreted under the laws of the State of Texas. Venue for any litigation arising under this contract shall lie in Williamson County, Texas.

Advertising

Vendor shall not advance or publish without BTCS's prior written consent the fact that BTCS has entered into a contract, except to the extent necessary to comply with proper requests for information from an authorized representative of the state or Federal government.

Dispute Resolution

The BTCS dispute resolution process must be used to attempt to resolve all disputes arising out of this contract.

PROHIBITED CONDITIONS:

Prohibition Against Personal Interest in Contracts

Employees and officers of BTCS and its contractors and subcontractors must not participate in the selection, award or administration of a contract paid with funds received from or through BTCS if a conflict of interest, real or apparent, is involved. A conflict of interest arises any time such an employee or officer has a financial interest or other interest, e.g. dual employment, in the entity selected for an award, and the existence of such conflict of interest will result in a voided contract. BTCS's Code of Conduct will apply to this proposal.

By submitting the proposal the Vendor certifies that there is no conflict of interest in performing the duties listed in the proposal and;

- is an authorized agent of the Vendor and,
- is not currently employed by BTCS and,
- has not offered or provided any gifts or gratuities to any employees in the decision making process of BTCS or a Board member of BTCS and,
- is not related within the second degree of consanguinity or affinity to an employee in the decision making process which is currently employed by BTCS or a Board Member of BTCS.

Gratuities

BTCS may, by written notice to the Vendor, cancel this contract without liability to the Vendor if it is determined by BTCS that the Vendor or its agent gave, offered to give or intends to give at any time hereafter any economic opportunity, future employment, gift, gratuity, special discount, trip, favor or service to a public servant in connection with the quote, proposal, or offer.

Collusion

Vendor warrants that no person or selling agency has been employed or retained to solicit or secure this contract upon an agreement or understanding for commission percentage, brokerage, or contingent fee except bona fide established commercial or selling agencies maintained by the Vendor for the purpose of securing businesses and disclosed to BTCS prior to the date of this contract.

Advertisement

Vendors are prohibited from using contract award information, sales values/volumes and/or BTCS consumers in sales brochures or other promotions, including press releases, unless prior written approval is obtained from BTCS.

Funding Out

If applicable, the Purchase Order or contract is made contingent upon the continuation of federally funded programs, or upon the continued availability of state or local funds to cover the full term and cost of this contract. This contract is subject to cancellation, without penalty, either in whole or in part, if funds are not appropriated. In this instance, BTCS may cancel this contract, by giving thirty (30) days written notice to the Vendor.

PROCESS OVERVIEW

BTCS reserves the right to accept or reject any or all proposals and to waive formalities and select the service Vendor that best meets the needs of BTCS and its employees. BTCS’s objective is to select a service Vendor who will provide the best possible service at the best possible cost while meeting Proposal specifications. BTCS is not obligated to award the contract based on cost alone.

During the evaluation process, BTCS reserves the right, where it may serve its best interest, to request additional information or clarifications from Vendor(s), or to allow corrections of errors or omissions. At the discretion of BTCS, firms submitting proposals may be requested to make oral presentations or web based demonstrations as part of the evaluation process.

BTCS reserves the sole right to evaluate the qualifications submitted, waive any irregularities, reject any respondent’s proposals and select the firm that, in its judgment, will provide the most satisfactory service.

Timeline

Responses are due by May 13, 2019. BTCS expects to make a Vendor recommendation for approval to the BTCS Executive Director by June 28, 2019. A mutually agreed upon implementation date will be selected by the Vendor and BTCS. The following table outlines BTCSs anticipated schedule. Dates are subject to change.

RFP ISSUED	April 12 2019
RFP Due	May 13, 2019
Review of Proposals	Through June 7, 2019
Final Vendor Selection; Contract review commences	Through June 14, 2019
BTCS Board & Executive Director Approval	June 28, 2019

Evaluation Criteria

This RFP is not intended to favor any vendor. It is solely designed to provide the best value to BTCS in meeting organization needs. The evaluation team will make a recommendation to the Executive Director. The evaluation team will review each proposal based on the following criteria:

Product and Provided Services, including implementation services (50%)

Each service Vendor will be asked to respond to the product and services information.

Product costs, Implementation Costs and Service Fees (20%)

The evaluation team will be looking for the best value in terms of both cost and service features.

Company background and stability of the company (30%)

General Conditions and Stipulations

Indemnification and Workers' Compensation

The Proposer agrees that if the contract is awarded to their institution, the institution shall defend, indemnify and hold harmless BTCS, its officials, agents, and employees from and against all claims, damages, losses, and expenses, including attorney fees, arising out of or resulting from the Proposer's acts or omission in the performance of the duties required under the contract.

Independent Contractor

It is agreed that nothing herein contained is intended or should be construed in any manner as creating or establishing the relationship of co-partners between the parties hereto or as constituting the Service Vendor as the agent, representative or employee of BTCS for any purpose or in any manner whatsoever. The Vendor is to be and shall remain an independent contractor with respect to all services performed under this contract. The Vendor represents that it has, or will secure at its own expense, all personnel required in performing services under this contract. Any and all personnel of the Vendor or other persons while so engaged, and any and all claims whatsoever on behalf of any such person or personnel arising out of employment or alleged employment including, without limitation, claims of discrimination against the Vendor, its officers, agents, contracts or employees shall in no way be the responsibility of BTCS; and the Vendor shall defend, indemnify and hold BTCS, its officers, agents, and employees harmless from any and all such claims regardless of any determination of any pertinent tribunal, agency, board, commission or court. Such personnel or other persons shall not require nor be entitled to any compensation, rights or benefits of any kind whatsoever from BTCS, including, without limitation, tenure rights, medical and hospital care, sick and vacation leave, Workers' Compensation, Unemployment Compensation, disability, and severance pay.

Nondiscrimination

In the performance of this contract, the Successful Proposer shall not discriminate on the grounds of or because of race, color, creed, religion, national origin, sex, marital status, status with regard to public assistance, disability, sexual orientation, or age against any of its employees, subcontractors or applicants for employment. The Successful Proposer shall include a similar provision in all contracts with subcontracts to this contract.

Miscellaneous

The proposer agrees to at all times observe and comply with all relevant laws, ordinances, regulations, and codes of the federal, state, and local government which may in any manner affect the preparation of proposals or the performance of the contract.

Instructions

Vendors can respond to the Request for Proposal by completing the information requested below: Required Vendor Information which includes system requirements, services, organization information, references and pricing. Responses may be typed directly on the electronic version of the RFP and returned with attachments, but must be sent to the designated agency addresses.

Attachment A: Proposer Questionnaire

Proposer General Information:

Complete (Legal) Name of Proposer: _____

Proposer Tax Identification Number: _____

Business Address: _____

Telephone Number: _____

Type of Organization: Individual Partnership Corporation Association

Other (please describe) _____

If incorporated, state of incorporation: _____

Date organization was formed (Month/Year): _____

Principal type of business: _____

Total number of years in business: _____

Proposer's history (include description of formation, mergers, acquisition, other names, etc.): _____

Number of years providing services similar to those requested in this RFP: _____

Please certify the following by placing an "X" in the appropriate column:

Certification	Yes	No
Is Proposer currently in the process of filing for bankruptcy?		
Has Proposer filed for bankruptcy within the past five (5) years?		
Do you certify that the Proposer does not owe taxes to the District?		
Do you certify that the Proposer is not currently under suspension or debarment by any governmental entity (local/state/federal government)?		
Do you acknowledge that if the Proposer is currently under suspension or debarment, its proposal may not be considered?		

Individual authorized to bind Proposer to contract:

Name/Title: _____
 Telephone: _____
 E-Mail: _____

Point of contact information for this RFP (if different from authorized individual):

Name/Title: _____
 Telephone: _____
 E-Mail: _____

Proposer Organization:

Executive Team

Name and Title of Executive	Role

List current number of full-time employees (FTEs) (minimum of 32 hours/week) in each category:

Employee Category	Total Number of Employees (Texas-based)	Total Number of Employees (Entity-wide)
Total FTE's		
Customer user support FTEs		
Customer technical support FTEs		
Research and development FTEs		
Project management FTEs		
Project implementation/rollout FTEs		
Other (please describe)		
Other (please describe)		
Other (please describe)		

Proposer Revenues:

What are the Proposer's total revenues received from Learning Management System sales and services during each of the last three (3) years (rounded to the nearest 1,000):

2018 Revenues: _____

2017 Revenues: _____

2016 Revenues: _____

How many customer software implementations does the Proposer currently support? _____

What is the annual contract value of the Proposer's three (3) largest software contracts?

Contract #1: _____

Contract #2: _____

Contract #3: _____

Proposer Pending Litigations:

Are there any current claims, or have any claims been made against the Proposer in the past 2 years? Yes
 No

If yes, please identify the claims and describe the dispensation of the claim or claims (include client name, description of litigations, imposed damage amounts, imposed dates, collected amount, and description of cause for litigation).

Attachment B: Conflict of Interest

CONFLICT OF INTEREST QUESTIONNAIRE For vendor or other person doing business with local governmental entity	FORM CIQ
<p>This questionnaire reflects changes made to the law by H.B. 1491, 80th Leg., Regular Session.</p> <p>This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the person meets requirements under Section 176.006(a).</p> <p>By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code.</p> <p>A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.</p>	OFFICE USE ONLY
<p>1 Name of person who has a business relationship with local governmental entity.</p>	Date Received
<p>2 Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)</p>	
<p>3 Name of local government officer with whom filer has employment or business relationship.</p> <p style="text-align: center;">_____</p> <p style="text-align: center;">Name of Officer</p> <p>This section (item 3 including subparts A, B, C & D) must be completed for each officer with whom the filer has an employment or other business relationship as defined by Section 176.001(1-a), Local Government Code. Attach additional pages to this Form CIQ as necessary.</p> <p>A. Is the local government officer named in this section receiving or likely to receive taxable income, other than investment income, from the filer of the questionnaire?</p> <p style="padding-left: 40px;">Yes No</p> <p>B. Is the filer of the questionnaire receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer named in this section AND the taxable income is not received from the local governmental entity?</p> <p style="padding-left: 40px;">Yes No</p> <p>C. Is the filer of this questionnaire employed by a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?</p> <p style="padding-left: 40px;">Yes No</p> <p>D. Describe each employment or business relationship with the local government officer named in this section.</p>	
<p>4</p> <p>_____</p> <p style="text-align: center;">Signature of person doing business with the governmental entity</p> <p style="text-align: right;">Date</p>	

Attachment C: Historically Underutilized Business (HUB) Form

BTCS policy is to include Historically Underutilized Businesses (HUBs) in its procurement process and to provide equal opportunities for HUB participation in the provision of supplies, services, equipment, and construction projects required by the District. As such, BTCS seeks to ensure that a “good faith effort” is made to assist certified HUB vendors and contractors in its award of contracts and subcontracts.

To be considered as a “Certified HUB Contractor/Vendor”, the contractor/vendor must have been certified by, and hold a current and valid certification, from any of the following certifying agencies recognized by BTCS : the Texas Building and Procurement Commission (State of Texas); City of Austin; and the Texas Unified Certification Program (TUCP), which includes six certifying agencies.

Proposer HUB Declaration

Is your company certified as a HUB or an MBE/WBE/DBE source? Yes No. If yes,

1. **Attach your certification to this form and return it in the proposal;**
2. Identify the certification agency by checking all that apply; Texas Building and Procurement Commission; City of Austin; Texas Unified Certification Program; and
3. Identify HUB Status (Gender & Ethnicity): _____

Subcontractor HUB Declaration

****Please complete this section if your proposal includes the use of HUB Subcontractors.****

Estimated percentage of the bid (proposal) that is to be subcontracted with Certified HUB Sources: _____

For each proposed HUB subcontractor, complete the information below and **attach the subcontractor’s HUB certification to this form and return it in the proposal.**

HUB Subcontractor Name	Contact Person/Title (First/Last Name)/Title	Telephone Number (including area code)	Email address (if available)

Required Vendor Product and Services Information

Prepared marketing materials may be submitted in *addition* to answering the questions below, however they will not be accepted *in lieu* of answering the below questions directly.

BTCS is looking for a learning management system that will include the following:

- General — Updated curricula that meets federal and TAC requirements with developed and accredited libraries specific to Behavioral Health, Autism, Developmental Disabilities, and Leadership and Administration. Curricula that has the ability to demonstrate competency as measured by tests with reasonable degrees of validity, reliability and fairness to eliminate the risk of discrimination against protected groups. Updated curricula and libraries that provide Continuing Education Units for licensed professionals in the State of Texas to include, but not limited to, Licensed Medical Doctors, Advanced Nurse Practitioners, Licensed Psychologists, Registered Nurses, Licensed Vocational Nurses, Licensed Chemical Dependency Counselors, and Licensed Practitioner of the Healing Arts. **Please describe your functionality and work flow to address the aforementioned items and provide detail on how often curricula are updated to maintain compliance with federal regulation and TAC.**
- **Are multiple browsers supported? If so, please list those browsers and versions supported. Does the learning management system support mobile access and learning? If so, please provide a description.**
- Administrative — Ability to customize standard curriculum to fit needs of our agency. Ability to post and distribute reports, ability to retain information on terminated employees without having an effect on licensing cost. Ability to add curriculum developed internally, and ability to send notifications to staff regarding upcoming and reoccurring training. **Please describe your administrative functionality to address the items listed above.**
- **Describe the hardware/software requirements for your system. Is the system run on a local server or hosted solution? If both local server and hosted solutions are available, what is the cost difference?**
- **Does the system integrate with Active Directory? If so, can users be imported from Active Directory?**
- **Describe system controls used to ensure data integrity.**
- **Describe the type of audit trails used by the system?**
- **Describe technical and user documentation.**
- **Describe your maintenance and support plans pre and post implementation.**
- **Provide a schedule and example of your implementation process to include a detailed project plan that specifies the roles and responsibilities of Learning Management System provider and**

Bluebonnet Trails Community Services with the responsible party for each task and the projected number of days for each task outlined.

References

List any relevant clients within the same industry and client size that you work with, preferably in Texas area. Provide contact information for at least three of these organizations.

Pricing

- a. Describe product pricing, both vendor hosted and customer hosted versions.
- b. Describe implementation and professional services fees.
- c. Describe costs for customizations/new development.
- d. Describe ongoing maintenance and support costs, and/or subscription fees.
- e. Include/attach copies of master service agreements, service level agreements, and any addenda/attachments/exhibits.
- f. Describe curriculum content levels.
- g. Describe cost per user, basic vs. content or curriculum levels.
- h. Describe any costs associated with training implementation.

END OF RFP –