

Solicitation 2013-295

Customer Line (Queuing) Management System

Bid designation: Public



Collin County

Bid 2013-295 Customer Line (Queuing) Management System

Bid Number **2013-295**
 Bid Title **Customer Line (Queuing) Management System**

Bid Start Date **In Held**
 Bid End Date **May 1, 2014 2:00:00 PM CDT**
 Question & Answer End Date **Apr 25, 2014 7:00:00 AM CDT**

Bid Contact **Jennifer Turner**
Buyer II
Purchasing
972-548-4124
jturner@co.collin.tx.us

Contract Duration **One Time Purchase**
 Contract Renewal **Not Applicable**
 Prices Good for **90 days**
 Pre-Bid Conference **Apr 22, 2014 2:00:00 PM CDT**
Attendance is optional
Location: Pre-Proposal Conference: A pre-proposal conference will be conducted by Collin County at 2:00 p.m., Tuesday, April 22, 2014, in the Collin County Central Jury Room, located at 2100 Bloomdale, McKinney, TX 75071. This is to provide an opportunity for all interested offeror's to ask questions. All prospective Offeror's are requested to have a representative present. It is the Offeror's responsibility to review the site and documents to gain a full understanding of the requirements of the RFP.

Standard Disclaimer *****Note to Bidders/Offerors~The following standard disclaimer applies to Invitation to Bid (IFB), Competitive Sealed Proposal (CSP), and Request for Proposal (RFP) ONLY, not applicable to Request for Qualifications (RFQ) or Request for Information (RFI).*****
Mailing Address:
Collin County Purchasing
2300 Bloomdale Rd., Ste 3160
McKinney, TX 75071
Prices bid/proposed shall only be considered if they are provided in the appropriate space(s) on the Collin County bid form(s). For consideration, any additions or deductions to the bid/proposal prices offered must be shown under the exceptions section of the bid/proposal in the case of electronic submittal, ONLY in the case of a hard copy submittal will an additional attachment be allowed. Extraneous numbers, prices, comments, etc. or bidder/offeror generated documents appearing elsewhere on the bid or as an additional attachment shall be deemed to have no effect on the prices offered in the designated locations.
All delivery and freight charges (F.O.B. inside delivery at Collin County designated locations) are to be included as part of the bid/quote/proposal price. All components required to render the item complete, installed and operational shall be included in the total bid/quote/proposal price. Collin County will pay no additional freight/delivery/installation/setup fees.

Bid Comments **The intended purpose for this Request For Proposal (RFP) and resulting contract is to provide offerors with sufficient information to prepare a proposal for a Customer Line Management System. The system will provide real-time monitoring of customer flow as well as analytical and reporting tools for an efficient management of the customer service function. The system would enable the reduction of customer wait time by streamlining the customer flow and lead to more efficient staff utilization by identifying areas where customer service is most critical.**

Item Response Form

Item **2013-295--01-01 - Total Price for Project to Include Equipment and Installation**
 Quantity **1 each**
 Unit Price
 Delivery Location **Collin County**
Collin County - See P.O.
2300 Bloomdale Rd., Ste. 3160
**** See P.O. for Job Site ****

McKinney TX 75071

Qty 1**Description**

See item 6.7.1

Item **2013-295--01-02 - Optional Features - Support Mobile Administrative Features**Quantity **1 each**Unit Price

Delivery Location

Collin County

Collin County - See P.O.
 2300 Bloomdale Rd., Ste. 3160
 ** See P.O. for Job Site **
 McKinney TX 75071

Qty 1**Description**

See item 6.7.2 for more information.

Item **2013-295--01-03 - For Budget Purposes Only - CSCD**Quantity **1 each**Unit Price

Delivery Location

Collin County

Collin County - See P.O.
 2300 Bloomdale Rd., Ste. 3160
 ** See P.O. for Job Site **
 McKinney TX 75071

Qty 1**Description**

See Section 6.7.3



COLLIN COUNTY, TEXAS TERMS AND CONDITIONS

1.0 GENERAL INSTRUCTIONS

1.0.1 Definitions

1.0.1.1 Bidder/Quoter/Offeror: refers to submitter.

1.0.1.2 Vendor/Contractor/Provider: refers to a Successful Bidder/Quoter/Contractor/Service Provider.

1.0.1.3 Submittal: refers to those documents required to be submitted to Collin County, by a Bidder/Quoter/Offeror.

1.0.1.4 IFB: refers to Invitation For Bid.

1.0.1.5 RFQ: refers to Request For Qualifications

1.0.1.6 RFP: refers to Request For Proposal.

1.0.1.7 RFI: refers to Request For Information.

1.0.1.8 CSP: refers to Competitive Sealed Proposal

1.0.1.9 Quotation: refers to Request for Quotation

1.1 If Bidder/Quoter/Offeror do not wish to submit an offer at this time, please submit a No Bid Form.

1.2 Awards shall be made not more than ninety (90) days after the time set for opening of submittals.

1.3 Collin County is always conscious and extremely appreciative of your time and effort in preparing your submittal.

1.4 Collin County exclusively uses BidSync for the notification and dissemination of all solicitations. The receipt of solicitations through any other company may result in your receipt of incomplete specifications and/or addendums which could ultimately render your bid non-compliant. Collin County accepts no responsibility for the receipt and/or notification of solicitations through any other company.

1.5 A bid/quote/submittal may not be withdrawn or canceled by the bidder/quoter/offeror prior to the ninety-first (91st) day following public opening of submittals and only prior to award.

1.6 It is understood that Collin County, Texas reserves the right to accept or reject any and/or all Bids/Quotes/Proposals/Submittals for any or all products and/or services covered in an Invitation For Bid (IFB), Request For Qualifications (RFQ), Request For Proposal (RFP), Request For Information (RFI), Competitive Sealed Proposal (CSP), and Quotation, and to waive informalities or defects in submittals or to accept such submittals as it shall deem to be in the best interest of Collin County.

1.7 All IFB's, RFP's, CSP's, RFQ's, and RFI's submitted in hard copy paper form shall be submitted in a sealed envelope, plainly marked on the outside with the IFB/RFP/RFQ/RFI/CSP/Quotation number and name. A hard copy paper form submittal shall be manually signed in ink by a person having the authority to bind the firm in a contract. Submittals shall be mailed or hand delivered to the Collin County Purchasing Department.

1.8 No oral, telegraphic or telephonic submittals will be accepted. IFB's, RFP's, RFQ's, CSP's, and RFI's, may be submitted in electronic format via **BidSync**.

1.9 All Invitation For Bids (IFB), Request For Proposals (RFP), Request For Qualifications (RFQ), Competitive Sealed Proposals (CSP), and Request For Information (RFI), submitted electronically via **BidSync** shall remain locked until official date and time of opening as stated in the Special Terms and Conditions of the IFB, RFP, RFQ, CSP, and/or RFI.

1.10 Time/date stamp clock in Collin County Purchasing Department shall be the official time of receipt for all Invitation For Bids (IFB), Request For Proposals (RFP), Request For Qualifications (RFQ), Competitive Sealed Proposals (CSP), Request For Information (RFI), submitted in hard copy paper form. IFB's, RFP's, RFQ's, CSP's, RFI's, received in County Purchasing Department after submission deadline shall be considered void and unacceptable. Absolutely no late submittals will be considered. Collin County accepts no responsibility for technical difficulties related to electronic submittals.

1.11 For hard copy paper form submittals, any alterations made prior to opening date and time must be initialed by the signer of the IFB/RFQ/RFP/CSP/RFI/, guaranteeing authenticity. Submittals cannot be altered or amended after submission deadline.

1.12 Collin County is by statute exempt from the State Sales Tax and Federal Excise Tax; therefore, the prices submitted shall not include taxes.

1.13 Any interpretations, corrections and/or changes to an Invitation For Bid/Request For Qualifications/Request For Proposal/Request for Information/Competitive Sealed Proposal, and related Specifications or extensions to the opening/receipt date will be made by addenda to the respective document by the Collin County Purchasing Department. Questions and/or clarification requests must be submitted no later than seven (7) days prior to the opening/receipt date. Those received at a later date may not be addressed prior to the public opening. Sole authority to authorize addenda shall be vested in Collin County Purchasing Agent as entrusted by the Collin County Commissioners' Court. Addenda may be transmitted electronically via **BidSync**, by facsimile, E-mail transmission or mailed via the US Postal Service.

1.13.1 Addenda will be transmitted to all that are known to have received a copy of the IFB/RFQ/RFP/RFI/CSP and related Specifications. However, it shall be the sole responsibility of the Bidder/Quoter/Offeror to verify issuance/non-issuance of addenda and to check all avenues of document availability (i.e. **BidSync at www.bidsync.com**, telephoning Purchasing Department directly, etc.) prior to opening/receipt date and time to insure Bidder/Quoter/Offeror's receipt of any addenda issued. Bidder/Quoter/Offeror shall acknowledge receipt of all addenda.

1.14 All materials and services shall be subject to Collin County approval.

1.15 Collin County reserves the right to make award in whole or in part as it deems to be in the best interest of the County.

1.16 The Bidder/Quoter/Offeror shall comply with Commissioners' Court Order No. 96-680-10-28, Establishment of Guidelines & Restrictions Regarding the Acceptance of Gifts by County Officials & County Employees.

1.17 Any reference to model/make and/or manufacturer used in specifications is for descriptive purposes only. Products/materials of like quality will be considered.

1.18 Bidders/Quoters/Offerors taking exception to the specifications shall do so at their own risk. By offering substitutions, Bidder/Quoter/Offeror shall state these exceptions in the section provided in the IFB/RFQ/RFP/CSP/Quotation or by attachment. Exception/substitution, if accepted, must meet or exceed specifications stated therein. Collin County reserves the right to accept or reject any and/or all of the exception(s)/substitution(s) deemed to be in the best interest of the County.

1.19 Minimum Standards for Responsible Prospective Bidders/Quoters/Offerors: A prospective Bidder/Quoter/Offeror must meet the following minimum requirements:

- 1.19.1 have adequate financial resources, or the ability to obtain such resources as required;
- 1.19.2 be able to comply with the required or proposed delivery/completion schedule;
- 1.19.3 have a satisfactory record of performance;
- 1.19.4 have a satisfactory record of integrity and ethics;
- 1.19.5 be otherwise qualified and eligible to receive an award.

Collin County may request documentation and other information sufficient to determine Bidder's/Quoter's/ Offeror's ability to meet these minimum standards listed above.

1.20 Vendor shall bear any/all costs associated with it's preparation of an RFI/IFB/RFQ/RFP/CSP/Quotation submittal.

1.21 Public Information Act: Collin County is governed by the Texas Public Information Act, Chapter 552 of the Texas Government Code. All information submitted by prospective bidders during the bidding process is subject to release under the Act.

1.22 The Bidder/Quoter/Offeror shall comply with Commissioners' Court Order No. 2004-167-03-11, County Logo Policy.

1.23 Interlocal Agreement: Successful bidder agrees to extend prices and terms to all entities that has entered into or will enter into joint purchasing interlocal cooperation agreements with Collin County.

1.24 Bid Openings: All bids submitted will be read at the county's regularly scheduled bid opening for the designated project. However, the reading of a bid at bid opening should be not construed as a comment on the responsiveness of such bid or as any indication that the county accepts such bid as responsive.

The county will make a determination as to the responsiveness of bids submitted based upon compliance with all applicable laws, Collin County Purchasing Guidelines, and project documents, including but not limited to the project specifications and contract documents. The county will notify the successful bidder upon award of the contract and, according to state law; all bids received will be available for inspection at that time.

2.0 TERMS OF CONTRACT

2.1 A bid/quote/proposal, when properly accepted by Collin County, shall constitute a contract equally binding between the Vendor/Contractor/Provider and Collin County. No different or additional terms will become part of this contract with the exception of an Amendment and/or a Change Order.

2.2 No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All Amendments and/or Change Orders to the contract will be made in writing by Collin County Purchasing Agent.

2.3 No public official shall have interest in the contract, in accordance with Vernon's Texas Codes Annotated, Local Government Code Title 5, Subtitle C, Chapter 171.

2.4 The Vendor/Contractor/Provider shall comply with Commissioners' Court Order No. 96-680-10-28, Establishment of Guidelines & Restrictions Regarding the Acceptance of Gifts by County Officials & County Employees.

2.5 Design, strength, quality of materials and workmanship must conform to the highest standards of manufacturing and engineering practice.

2.6 Bids/Quotes/Proposals must comply with all federal, state, county and local laws concerning the type(s) of product(s)/service(s)/equipment/project(s) contracted for, and the fulfillment of all ADA (Americans with Disabilities Act) requirements.

2.7 All products must be new and unused, unless otherwise specified, in first-class condition and of current

manufacture. Obsolete products, including products or any parts not compatible with existing hardware/software configurations will not be accepted.

2.8 Vendor/Contractor/Provider shall provide any and all notices as may be required under the Drug-Free Work Place Act of 1988, 28 CFR Part 67, Subpart F, to its employees and all sub-contractors to insure that Collin County maintains a drug-free work place.

2.9 Vendor/Contractor/Provider shall defend, indemnify and save harmless Collin County and all its officers, agents and employees and all entities, their officers, agents and employees who are participating in this contract from all suits, claims, actions, damages (including personal injury and or property damages), or demands of any character, name and description, (including attorneys' fees, expenses and other defense costs of any nature) brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of Vendor/Contractor/Provider's breach of the contract arising from an award, and/or any negligent act, error, omission or fault of the Vendor/Contractor/Provider, or of any agent, employee, subcontractor or supplier of Vendor/Contractor/Provider in the execution of, or performance under, any contract which may result from an award. Vendor/Contractor/Provider shall pay in full any judgment with costs, including attorneys' fees and expenses which are rendered against Collin County and/or participating entities arising out of such breach, act, error, omission and/or fault.

2.10 If a contract, resulting from a Collin County IFB, RFP, RFQ, CSP, Quotation is for the execution of a public work, the following shall apply:

2.10.1 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Payment Bond if the contract is in excess of \$25,000.00. Such bond shall be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56th Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.10.2 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Performance Bond if the contract is in excess of \$100,000.00. Such bond shall be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56th Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.11 Purchase Order(s) shall be generated by Collin County to the vendor. Collin County will not be responsible for any orders placed/delivered without a valid purchase order number.

2.12 The contract shall remain in effect until any of the following occurs: delivery of product(s) and/or completion and acceptance by Collin County of product(s) and/or service(s), contract expires or is terminated by either party with thirty (30) days written notice prior to cancellation and notice must state therein the reasons for such cancellation. Collin County reserves the right to terminate the contract immediately in the event the Vendor/Contractor/Provider fails to meet delivery or completion schedules, or otherwise perform in accordance with the specifications. Breach of contract or default authorizes the County to purchase elsewhere and charge the full increase in cost and handling to the defaulting Vendor/Contractor/Provider.

2.13 Collin County Purchasing Department shall serve as Contract Administrator or shall supervise agents designated by Collin County.

2.14 All delivery and freight charges (FOB Inside delivery at Collin County designated locations) are to be included as part of the bid/quote/proposal price. All components required to render the item complete, installed and operational shall be included in the total bid/quote/proposal price. Collin County will pay no additional freight/delivery/installation/setup fees.

2.15 Vendor/Contractor/Provider shall notify the Purchasing Department immediately if delivery/completion schedule cannot be met. If delay is foreseen, the Vendor/Contractor/Provider shall give written notice to the Purchasing Agent. The County has the right to extend delivery/completion time if reason appears valid.

2.16 The title and risk of loss of the product(s) shall not pass to Collin County until Collin County actually receives and takes possession of the product(s) at the point or points of delivery. Collin County shall generate a purchase order(s) to the Vendor/Contractor/Provider and the purchase order number must appear on all itemized invoices.

- 2.17 Invoices shall be mailed directly to the Collin County Auditor's Office, 2300 Bloomdale Road, Suite 3100, McKinney, Texas 75071. All invoices shall show:
- 2.17.1 Collin County Purchase Order Number;
 - 2.17.2 Vendor's/Contractor's/Provider's Name, Address and Tax Identification Number;
 - 2.17.3 Detailed breakdown of all charges for the product(s) and/or service(s) including applicable time frames.
- 2.18 Payment will be made in accordance with V.T.C.A., Government Code, Title 10, Subtitle F, Chapter 2251.
- 2.19 All warranties shall be stated as required in the Uniform Commercial Code.
- 2.20 The Vendor/Contractor/Provider and Collin County agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code.
- 2.21 The Vendor/Contractor/Provider agree to protect Collin County from any claims involving infringements of patents and/or copyrights.
- 2.22 The contract will be governed by the laws of the State of Texas. Should any portion of the contract be in conflict with the laws of the State of Texas, the State laws shall invalidate only that portion. The remaining portion of the contract shall remain in effect. The contract is performable in Collin County, Texas.
- 2.23 The Vendor/Contractor/Provider shall not sell, assign, transfer or convey the contract, in whole or in part, without the prior written approval from Collin County.
- 2.24 The apparent silence of any part of the specification as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the specification shall be made on the basis of this statement.
- 2.25 Vendor/Contractor/Provider shall not fraudulently advertise, publish or otherwise make reference to the existence of a contract between Collin County and Vendor/Contractor/Provider for purposes of solicitation. As exception, Vendor/Contractor/Provider may refer to Collin County as an evaluating reference for purposes of establishing a contract with other entities.
- 2.26 The Vendor/Contractor/Provider understands, acknowledges and agrees that if the Vendor/Contractor/Provider subcontracts with a third party for services and/or material, the primary Vendor/Contractor/Provider (awardee) accepts responsibility for full and prompt payment to the third party. Any dispute between the primary Vendor/Contractor/Provider and the third party, including any payment dispute, will be promptly remedied by the primary vendor. Failure to promptly render a remedy or to make prompt payment to the third party (subcontractor) may result in the withholding of funds from the primary Vendor/Contractor/Provider by Collin County for any payments owed to the third party.
- 2.27 Vendor/Contractor/Provider shall provide Collin County with diagnostic access tools at no additional cost to Collin County, for all Electrical and Mechanical systems, components, etc., procured through this contract.
- 2.28 Criminal History Background Check: If required, ALL individuals may be subject to a criminal history background check performed by the Collin County's Sheriff's Office prior to access being granted to Collin County. Upon request, Vendor/Contractor/Provider shall provide list of individuals to Collin County Purchasing Department within five (5) working days.
- 2.29 Non-Disclosure Agreement: Where applicable, vendor shall be required to sign a non-disclosure agreement acknowledging that all information to be furnished is in all respects confidential in nature, other than information which is in the public domain through other means and that any disclosure or use of same by vendor, except as provided in the contract/agreement, may cause serious harm or damage to Collin County. Therefore, Vendor agrees that Vendor will not use the information furnished for any purpose other than that stated in contract/agreement, and agrees that Vendor will not either directly or indirectly by agent, employee, or representative disclose this information, either in whole or in part, to any third party, except on a need to know basis for the purpose of evaluating any possible transaction. This agreement shall be binding upon Collin County and Vendor, and upon the directors, officers, employees and agents of each.

2.30 Vendors/Contractors/Providers must be in compliance with the Immigration and Reform Act of 1986 and all employees specific to this solicitation must be legally eligible to work in the United States of America.

2.31 Certification of Eligibility: This provision applies if the anticipated Contract exceeds \$100,000.00 and as it relates to the expenditure of federal grant funds. By submitting a bid or proposal in response to this solicitation, the Bidder/Quoter/Offeror certifies that at the time of submission, he/she is not on the Federal Government's list of suspended, ineligible, or debarred contractors. In the event of placement on the list between the time of bid/proposal submission and time of award, the Bidder/Quoter/Offeror will notify the Collin County Purchasing Agent. Failure to do so may result in terminating this contract for default.

2.32 Notice to Vendors/Contractors/Providers delivering goods or performing services within the Collin County Detention Facility: The Collin County Detention Facility houses persons who have been charged with and/or convicted of serious criminal offenses. When entering the Detention Facility, you could: (1) hear obscene or graphic language; (2) view partially clothed male inmates; (3) be subjected to verbal abuse or taunting; (4) risk physical altercations or physical contact, which could be minimal or possibly serious; (5) be exposed to communicable or infectious diseases; (6) be temporarily detained or prevented from immediately leaving the Detention Facility in the case of an emergency or "lockdown"; and (7) subjected to a search of your person or property. While the Collin County Sheriff's Office takes every reasonable precaution to protect the safety of visitors to the Detention Facility, because of the inherently dangerous nature of a Detention Facility and the type of the persons incarcerated therein, please be advised of the possibility of such situations exist and you should carefully consider such risks when entering the Detention Facility. By entering the Collin County Detention Facility, you acknowledge that you are aware of such potential risks and willingly and knowingly choose to enter the Collin County Detention Facility.

2.33 Delays and Extensions of Time when applicable:

2.33.1 If the Vendor/Contractor/Provider is delayed at any time in the commence or progress of the Work by an act or neglect of the Owner or Architect/Engineer, or of an employee of either, or of a separate contractor employed by the Owner, or by changes ordered in the Work, or by labor disputes, fire, unusual delay in deliveries, unavoidable casualties or other causes beyond the Vendor/Contractor/Provider's control, or by delay authorized by the Owner pending mediation and arbitration, or by other causes which the Owner or Architect/Engineer determines may justify delay, then the Contract Time shall be extended by Change Order for such reasonable time as the Owner/Architect may determine.

2.33.2 If adverse weather conditions are the basis for a Claim for additional time, such Claim shall be documented by data substantiating that weather conditions were abnormal for the period of time and could not have been reasonably anticipated, and that the weather conditions had an adverse effect on the scheduled construction.

NOTE: All other terms and conditions (i.e. Insurance Requirements, Bond Requirements, etc.) shall be stated in the individual IFB/RFQ/RFP/RFI/CSP/Quotation Solicitation documents as Special Terms, Conditions and Specifications.

3.0 INSURANCE REQUIREMENTS

3.1 Before commencing work, the vendor shall be required, at its own expense, to furnish the Collin County Purchasing Agent with certified copies of all insurance certificate(s) indicating the coverage to remain in force throughout the term of this contract.

3.1.1 **Commercial General Liability** insurance including but not limited to the coverage indicated below. Coverage shall not exclude or limit Products/Completed Operations, Contractual Liability, or Cross Liability.

- Each Occurrence: \$1,000,000
- Personal & Adv Injury: \$1,000,000
- Products/Completed Operation: \$2,000,000
- General Aggregate: \$2,000,000

3.1.2 **Workers Compensation** insurance as required by the laws of Texas, and Employers' Liability.

Employers' Liability

- Liability, Each Accident: \$500,000
- Disease-Each Employee: \$500,000
- Disease – Policy Limit: \$500,000

3.1.3 **Commercial Automobile Liability** insurance including owned, non-owned, and hired vehicles used in connection with the contract.

- Combined Single Limit – Each Accident: \$1,000,000

3.1.4 **Umbrella/Excess Liability** insurance.

- Each Occurrence/Aggregate: \$1,000,000

3.2 With reference to the foregoing insurance requirement, the vendor shall endorse applicable insurance policies as follows:

3.3.1 A waiver of subrogation in favor of Collin County, its officials, employees, volunteers and officers shall be contained in all policies.

3.3.2 The vendor's insurance coverage shall name Collin County as additional insured under the General Liability policy.

3.3.3 All insurance policies shall be endorsed to require the insurer to immediately notify Collin County of any decrease in the insurance coverage limits.

3.3.4 All insurance policies shall be endorsed to the effect that Collin County will receive at least thirty (30) days notice prior to cancellation, non-renewal or termination of the policy.

3.3.5 All copies of Certificates of Insurance shall reference the project/contract number.

3.4 All insurance shall be purchased from an insurance company that meets the following requirements:

3.4.1 A financial rating of B+VI or better as assigned by the BEST Rating Company or equivalent.

3.5 Certificates of Insurance shall be prepared and executed by the insurance company or its authorized agent, and shall contain provisions representing and warranting the following:

3.5.1 Sets forth all endorsements and insurance coverages according to requirements and instructions contained herein.

3.5.2 Sets forth the notice of cancellation or termination to Collin County.

4.0 EVALUATION CRITERIA AND FACTORS

4.1 The award of the contract shall be made to the responsible offeror whose proposal is determined to be the lowest and best evaluated offer resulting from negotiation, taking into consideration the relative importance of price and other factors set forth in the Request For Proposals in accordance with Vernon's Texas Code Annotated, Local Government.

4.1.1 The evaluation criteria will be grouped into percentage factors as follows:

45%	PROJECT PLAN & METHODOLOGY
	Key factors to be considered:
	Customizations
	Reporting
	Ease of Use/Functionality
10%	TECHNICAL RESPONSE
15%	REFERENCES
30%	COST

The Evaluation Committee will review all proposals received by the Opening date and time as part the evaluation process. During the evaluation process, the County may contact offerors to ask for clarification. The County may ask for additional information and/or conduct discussions with those offerors who are deemed to be reasonable susceptible of being selected for award. Offerors who are reasonably susceptible of being selected for award may also be requested to submit Best and Final offers.

5.0 SPECIAL CONDITIONS AND SCOPE OF SERVICES

5.1 Authorization: By order of the Commissioners' Court of Collin County, Texas sealed proposals will be received for a Customer Line (Queuing) Management System (CLMS) for Collin County from qualified providers with expertise in providing a comprehensive system.

5.2 Intent of Request for Proposal: The intended purpose for this Request For Proposal (RFP) and resulting contract is to provide offerors with sufficient information to prepare a proposal for a CLMS. The system will provide real-time monitoring of customer flow as well as analytical and reporting tools for an efficient management of the customer service function. The system would enable the reduction of customer wait time by streamlining the customer flow and lead to more efficient staff utilization by identifying areas where customer service is most critical.

5.3 Pre-Proposal Conference: A pre-proposal conference will be conducted by Collin County at 2:00 p.m., April 22, 2014 at the Central Jury Room, Collin County Courthouse, 2100 Bloomdale, McKinney, TX 75071. This is to provide an opportunity for all interested vendors to ask questions. All prospective Offeror's are requested to have a representative present. It is the Offeror's responsibility to review the site and documents to gain a full understanding of the requirements of the RFP.

5.4 Term: Provide for a contract commencing on the date of the award until project is complete with the option to include the Optional CSCD portion if approved in the FY2015 budget.

5.5 Funding: Funds for payment for Collin County expenditures have been provided through the Collin County budget approved by the Commissioners' Court for this fiscal year only. All other participating entities expenditures have been provided through their entity's governing body for this fiscal year only. State of Texas statutes prohibit any obligation of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that arise past the end of the current fiscal year shall be subject to budget approval. Please note funding is only approved for the District Clerk at this time. We are requesting budget pricing for CSCD (as described in this proposal) to be considered in a future budget cycle.

5.6 Price Reduction: If during the life of the contract, the vendor's net prices to other customers under the same terms and conditions for items/services awarded herein are reduced below the contracted price, it is understood and agreed that the benefits of such reduction shall be extended to Collin County.

5.7 Delivery/Completion/Response Time: Vendor shall place product(s) and/or complete service(s) at the County's designated location in accordance with the proposal schedule, provided in the project plan. (See section 6.3)

5.8 Delivery/Setup/Installation Location: Locations for delivery and installation will be stated on each ordering entity's purchase order. Delivery shall include assembly, set-up and installation and shall be included in the proposal.

5.9 Testing: Testing may be performed at the request of Collin County, by an agent so designated by the County, without expense to Collin County.

5.10 Samples/Demos: When requested, samples/demos shall be furnished free of expense to Collin County.

5.11 Objectives: Collin County is seeking proposals for a CLMS with a client server solution. Proposal shall include software and hardware from qualified, experienced providers that outline a turn-key approach to implementing a System that meets our requirements.

5.12 Statement of Work: This section contains requirements and relevant information Proposers should use for the preparation of their proposals. Successful proposals will provide services that meet at a minimum the service goals indicated below.

5.12.1 Software Functionality

5.12.1.1 Track the customer from the time they request service in the lobby to the completion of their visit in order to measure the clerk's customer throughput.

5.12.1.2 Employees and managers shall have the ability to reroute their personnel assignments to other available employees.

5.12.1.3 Managers/supervisors should be able to monitor the customer lines in real time and perform administrative functions from a computer. Optional - Manager/supervisor should be able to monitor the customer lines and perform administrative functions and should be accessed from a mobile tablet or tablet PC.

5.12.1.4 Customers can schedule an appointment using a website or from their smartphone or tablet (vendor created app). The customer should be provided with a date and time they will be serviced.

5.12.1.5 The vendor shall provide a list of all reports available to the end user. Supervisor reports shall be outlined. This would include any charting/graphs/statistics that can be pulled and analyzed by upper management.

5.12.1.6 All information entered into the system can be reviewed at manager's discretion. Statistical comparisons from week to week, month to month, and year to year are to be provided.

5.12.1.7 All reporting should be viewable online, created in real time, and available for printing.

5.12.1.8 The system should provide statistical reports in Crystal Report or MS Excel format. Data should be displayed on the reports in numbers and as well as percentages.

5.12.1.9 The system shall provide a daily log of customers assisted by the clerks. This report should be customizable by the user to allow different sort sequences for the report.

5.12.1.10 All public-facing functions of the system will need to be presented in 2 languages, English and Spanish.

5.12.1.11 System needs to be able to route customers to a specific clear window based upon type of service the customer needs.

5.12.2 Hardware Requirements

District Clerk

Kiosk Requirements:

5.12.2.1 The District Clerk is requesting that the Vendor recommend the quantity of kiosks that are required to optimize the throughput of customers arriving at the Collin County Courthouse and the Plano Passport office. The offices listed in 5.12.2.1.1 are in close proximity to each other and provide three (3) distinct and unrelated services.

5.12.2.1.1 Collin County Courthouse – District Clerk Civil, Passports, Child Support & Collections – 2100 Bloomdale, McKinney, Texas 75071 -1st Floor

5.12.2.1.2 Collin County - District Clerk - Plano Passport Office – 900 E. Park Blvd, Plano, Texas 75074

5.12.2.2 The kiosk shall have a touch-screen keyboard for manual check-in functions.

Monitor/Display Requirements:

5.12.2.3 The Vendor will recommend the number of color LCD/LED monitors for viewing by prospective customers. It is the responsibility of the vendor to propose the size of the monitors displayed based on the department's areas they will be used in. The proposed monitors will be used for displaying the 'Now Serving' number:

5.12.2.3.1 Collin County Courthouse – District Clerk Civil, Passports, Child Support & Collections – 2100 Bloomdale, McKinney, Texas 75071 - 1st Floor

5.12.2.3.2 Collin County - District Clerk - Plano Passport Office - 900 E. Park Blvd, Plano, Texas 75074

5.12.2.4 The monitors shall have the capability of displaying County sponsored videos or slideshow presentations that complement the ‘Now Serving’ number display.

“Now Serving” Displays Over Front Counter Station Requirements:

5.12.2.5 The new system will provide the following “Now Serving” number displays for each location:

5.12.2.5.1 Collin County Courthouse – District Clerk Civil, Passports, Child Support & Collections – 2100 Bloomdale, McKinney, Texas 75071 - 1st Floor – 10 Displays

5.12.2.5.2 Collin County - District Clerk - Plano Passport Office – 900 E. Park Blvd, Plano, Texas 75074 – 4 Displays

5.12.2.6 The vendor is encouraged to recommend how Spanish can be accommodated on the “Now Serving” display.

CSCD Hardware Requirements– For Budget Purposes Only

Kiosk Requirements: –For Budget Purposes Only

5.12.2.7 One (1) freestanding Kiosk for use by prospective customers including handicap access.

5.12.2.7.1 Collin County Community Supervision and Corrections Department – 2100 Bloomdale, #12262, McKinney, TX 75071

5.12.2.8 The Vendor will also recommend a quantity for the kiosks that optimize the throughput for customers arriving in the CSCD McKinney location.

5.12.2.9 The kiosk shall have a touch-screen keyboard for manual check-in functions.

Monitor/Display Requirements: –For Budget Purposes Only

5.12.2.10 A minimum of two (2) color LCD/LED monitors for viewing by prospective customers. It is the responsibility of the vendor to propose the size of the monitors displayed based on the department’s areas they will be used in. Each monitor, unless otherwise stated, will be located in the CSCD McKinney location lobby and will be used for displaying the ‘Now Serving’ number:

5.12.2.10.1 Collin County Community Supervision and Corrections –
2100 Bloomdale, #12262, McKinney, TX 75071

5.12.2.11 The monitors shall have the capability of displaying County sponsored videos or slideshow presentations that complement the ‘Now Serving’ number display.

“Now Serving” Displays Over Front Counter Station Requirements - For Budget Purposes Only

5.12.2.12 The new system will provide the following “Now Serving” number displays for this location:

5.12.2.12.1 Collin County Community Supervision and Corrections –
2100 Bloomdale, #12262, McKinney, TX 75071 – 8
displays

5.12.2.13 The vendor is encouraged to recommend how Spanish can be accommodated on the “Now Serving” display.

5.12.3 System Administration and Security - The proposed system shall provide the ability to review and modify tables that identify independent location environments which establishes each location’s data, parameters and customer processing information.

5.12.3.1 The proposed system shall provide the ability for the system administrator to set the means and parameters to include, but not be limited to, reporting, real-time statistics, manage and/or monitor customer lobbies to know the current wait/service time, exact numbers of customers waiting and employees currently logged in.

5.12.3.2 The proposed system shall provide the ability to review and modify system maintenance tables.

5.12.3.3 The proposed system shall provide the ability to establish various levels of security profiles for any individual assigned a valid clerk user identification password and tailor each security level according to the clerk’s unique operational requirements.

5.12.3.4 The proposed system shall provide an audit feature for tracking clerk user activity.

5.12.3.5 System tables containing application variables, parameters, codes and descriptions should be accessible to the system administrators for update.

5.12.3.6 System security is to be available at multiple levels: User [IDs and Passwords], transaction, report, field, etc.

5.12.3.7 The system should allow the system administrators to define who may access the system and what data the user will be permitted to view or update.

5.12.3.8 As with any system that allows online updates, and especially any system where updates are allowed via phone or web, audit and system logs should be available. Any updates to data should be recorded in the logs and available for reporting / review.

5.12.4 Web Functionality

5.12.4.1 Web Based Functionalities: A Web based application shall provide customers with services that are accessible 5 days a week during regular business hours, excluding office closures for holidays or inclement weather. Between the two District Clerk service sites, it is estimated that once clients become aware of the on-line ticket access, that 300 clients may take advantage of this service each day. These services shall include the customer receiving a ticket via SMS or text messaging and customer can also view the waiting time. Customers using the web based application should also have the same options as if they were standing in front of the kiosk in the lobby. The application will integrate with the Software to perform designated functions and provide the ability to produce management reports.

5.12.4.1.1 The proposed application shall require the clerk to log in using a unique identifier.

5.12.4.1.2 The application shall provide a security feature that automatically logs off a clerk after a designated time of inactivity.

5.12.4.1.3 The proposed application shall provide the clerk the option to transfer the customer's request to another clerk for assistance and provide an electronic means of reviewing these requests. Transfers will be included in the daily log. When a customer is transferred to another clerk, the system will automatically move to the next ticket.

5.12.4.1.4 The vendor shall explain the process flow when a customer requests a ticket from their smartphone or tablet.

5.12.4.1.5 The proposed application shall provide the clerk a means of viewing, saving and printing customer requests received via the web application for processing.

5.12.4.1.6 The proposed application shall allow the customer to cancel his or her ticket request. The system will update the clerk's information in the CLMS database and automatically move to the next available ticket.

5.12.4.1.7 The proposed application shall provide the customer with specific information regarding the service they have requested to include service or case type, location, date, time and other pertinent clerk service information. The application will also indicate the customer's status in line.

5.12.4.1.8 The web interface function shall have the ability to provide links customized for each department to the Collin County web pages. The application shall also provide links to informational web sites if needed.

5.12.4.1.9 The system shall provide the ability for a customer to remotely access a ticket to allow them a place in line, as if they were physically present in the lobby.

5.12.4.1.10 The system will be able to alert a customer of their status in line by email and/or text.

5.12.4.1.11 The system shall provide the capability of allowing a customer to schedule an appointment via the web. For example, the District Clerk would also like customers to have the ability to schedule an appointment for Passport services.

5.12.5 Interactive Mobile Messaging

5.12.5.1 We encourage prospective Vendors to propose Interactive Mobile Messaging functionalities that include customers using their smartphones or tablets to receive information from the CLMS to find answers for common questions asked by customers. This feature could include the estimated time they will be helped by a clerk at the window, which location, and interactive maps using GPS to navigate to the Courthouse or the Plano Passport office. The Vendor proposal should also include suggestions as to how a smartphone or tablet can be used to check-in while inside or outside of the Collin County Courthouse.

5.12.5.2 When reviewing proposals, Collin County will focus on Vendors offering new mobile messaging capabilities and functionalities (smartphone, tablets) for requesting appointments, checking their status in line or appointments from a smartphone or tablet without having to be present onsite.

5.12.5.3 Any smartphone or tablet functionality will need to be compliant with Apple, Android, and Windows RT operating systems.

5.13 TECHNICAL SPECIFICATIONS

General System Requirements

5.13.1 The District Clerk's office expects at least 105,000 client encounters between their three service sites annually. Vendor's proposal shall include the CLMS capacity thresholds (min/max) for scalability and expansion.

5.13.2 Support the option of TDD terminals.

5.13.3 Optional - Support smartphone devices and tablets.

- 5.13.4 Provide System Redundancy built into the proposed system to account for hardware failure.
- 5.13.5 Support Internet Explorer 8.X, Google Chrome, Mozilla Firefox and Apple Safari web browsers.
- 5.13.6 Vendors should explain how the web application will “live” in a secure “DMZ” environment.
- 5.13.7 Provide security for web traffic with SSL Protocols acceptable to the Collin County standards.
- 5.13.8 Provide the county with system administration tools to define and setup different security levels (e.g. inquiry, update, etc.) based on the Collin County user’s job role.
- 5.13.9 Operate in Windows XP/7/8.
- 5.13.10 Certified to operate in a VMware environment.
- 5.13.11 Provide for a software and hardware setup in a production environment as well as provide replicated development and testing and quality assurance environments that mirror the production environment.
- 5.13.12 Provide a system capable of large scale data conversion from the District Clerk’s current CLMS to the proposed system if possible.
- 5.13.13 Export data to external applications (.txt, .xml, .csv, Excel, Word, and .pdf formats).
- 5.13.14 Provide canned standard reports as well as Clerk user-defined and generated customized, ad hoc reports using mainstream report generation software tools such as Crystal Reports and in real time.
- 5.13.15 Provide development software tools that can be used to extract data from the database for reporting purposes.
- 5.13.16 Provide the ability to allow Collin County to write queries against the system’s database to generate ad hoc reports without compromising system response time.
- 5.13.17 Vendor’s proposal to identify the process to include customizations to the baseline CLMS.
- 5.13.18 Provide patch fixes and software upgrades at regular scheduled intervals (to be determined by the County and Vendor) at no cost to Collin County.
- 5.13.19 Process customers efficiently and accurately with acceptable response times determined by Collin County. To include mail and phone customers.
- 5.13.20 Provide system availability and reliability 5 days a week during regular business hours, except for minimal scheduled down time for routine maintenance as recommended by the Vendor and agreed to by the Collin County.
- 5.13.21 Allow the Collin County to own and have unrestricted access to the data within the database including a complete set of object and source code and system

documentation for a CLMS subject to Collin County entering into a confidentiality agreement with the Vendor.

5.13.22 Warrant that the software and other hardware provided by the Vendor will be compatible with and function on Collin County supplied equipment and software, and operate with the Collin County network configuration. The Vendor will be responsible for providing any additional hardware, software, or service necessary to provide the specified functionality.

5.13.23 Provide the Collin County offices with a comprehensive, final detailed system design configuration, including the CLMS and all associated application systems prior to start of system installation and in accordance with an agreed upon delivery schedule for review and approval by the County.

System Administration

5.13.24 Provide backup procedures integrated with Collin County present backup procedures and administered by a database administrator. This procedure shall allow unattended, daily back-up of the database without bringing down the system database.

5.13.25 Provide Collin County authorized personnel the ability to monitor the system with real time data via system logs and real time displays.

5.13.26 Identify the system administration terminal options via a desktop PC, laptop or tablet dedicated to the administration of the system.

System Administration Training

5.13.27 Provide a training plan and training to ensure that the County support staff can adequately perform all basic system related administrative, diagnostic and proactive management functions within the proposed system.

5.13.28 Provide detailed system documentation that describes all system administration functions.

5.13.29 Provide the County with an electronic copy of the User's Manual and the Systems Administration Guide.

Database Administration and Security

5.13.30 Provide system functionality to define authorized clerk user identifications and associated passwords to protect against unauthorized access to the database.

5.13.31 Describe the proposed system's access and security control, including the types of access permitted to include clerk user roles (i.e., support staff, management staff, and system administration staff).

5.13.32 Provide the ability to administer clerk user access, limit his/her functional access corresponding to his/her assigned role and job description. Only those functions

accessible to the clerk user are to be displayed on the screen. Provide activity logs of all clerk user activities within the system.

Vendor Response to System Problems

5.13.33 Provide implementation support and ongoing Production Support including without limitation telephone support, remote access support or in-person support at the County

5.13.34 Provide for a fail-over process in case of a processor failure or natural disaster.

5.13.35 Provide total system failure procedures identifying if system will be a self-contained re-boot or if it will require manual intervention.

5.13.36 Provide a disaster recovery plan that would restore data if the clerk's data center was rendered unusable as a result of a natural disaster or major catastrophe.

5.13.37 In the event of a system or database crash, provide database restore procedures for immediate recovery following the restoration or correction of a hardware or software failure.

5.14 Warranty Service Response to System Problems

5.14.1 Warranty service shall include Vendor response to system problems in the following manner: Service shall include, when necessary, all service, parts and labor, necessary and be available twenty-four (24) hours per day, seven (7) days per week.

5.14.2 No charge will be made to the County for service calls outside Vendor's normal working hours and as necessary to meet the needs of the County.

Service Response Time and Requirements

5.14.3 Response to major failure maintenance calls shall not exceed two (2) hours. Major Failure maintenance shall be defined as follows:

5.14.3.1 The entire system is inoperative.

5.14.3.2 There are two or more system re-boots of the application server in a twenty-four hour period; or

5.14.3.3 There are two (2) or more system reboots to the database server in a twenty-four hour period.

5.14.4 Response to a minor failure shall not exceed the next business day following the report. Minor Failure maintenance shall be defined as follows:

5.14.4.1 A request for service when a major failure does not exist shall be deemed to be a minor failure.

5.14.4.2 When a minor failure occurs, Vendor agrees to send qualified maintenance personnel, as required, to arrive at the affected clerk facility within twenty-four (24) clock hours of request, 8:00 A.M. to 5:00 P.M.

Central Time, Monday through Friday, excluding weekends and county holidays.

5.14.4.3 If Vendor successfully corrects a minor failure within the required response period remotely, and no Vendor on-site presence is required to restore the system to proper performance levels, the 24-hour on-site response requirement shall be waived.

5.14.4.4 In the event of a hardware failure, "Vendor's response" means that the Vendor's technician is physically at the Collin County location.

5.14.4.5 In the event of a software failure, response shall mean the Vendor's technician/support representative may connect remotely to the servers to resolve the issue. Access to the system will be granted by County's Information Technology Department.

5.14.5 When a request for emergency service is received from Collin County, vendor agrees to send qualified maintenance personnel, as required, to arrive at the affected Collin County site within two (2) hours of request, 5 days a week during regular business hours, excluding office closures for holidays or inclement weather. If Vendor successfully corrects a declared emergency condition within the 2-hour response period remotely and no Vendor on-site presence is required to restore the system to proper performance levels, the 2-hour on-site response requirement shall be waived.

5.14.5.1 In the event of a system emergency, the Vendor shall: (1) prioritize emergency; (2) escalate within the Vendor's technical and management organizations as necessary to resolve the emergency; (3) use its best efforts to correct the emergency within four hours from receipt of notice of such emergency; and, (4) maintain continuous work until the emergency is corrected to Collin County reasonable satisfaction. In the event that any emergency is not corrected by the Vendor within twelve (12) hours from receipt of notice, the successful Vendor shall replace that portion of the system causing such emergency with new items of equipment or software within twenty-four (24) hours from receipt of the emergency. Vendor will provide an escalation call list.

5.14.5.2 In the event the Vendor chooses to perform field repairs on defective equipment and such repaired equipment continues to experience repeated failures adversely affecting the system, the Vendor shall, upon the County agreement, replace such defective equipment at no cost to the County rather than continuing to perform field repairs. Component failure should not occur more than three times. On the fourth failure of that component, the component will need to be replaced by the vendor with the same or comparable new component.

5.14.5.3 Should the condition require that Vendor re-boot the system or perform any action that could lead to a system re-boot or any other adverse condition, Vendor shall first notify the County's designated contact person and obtain permission before proceeding. This condition pertains to both remote and on-site conditions. The County's designated contact person will notify Collin County IT Department of the outage and the required re-boot of the system.

5.15 Reporting Tools

5.15.1 The system shall generate a log or audit report reflecting all clerk users of the system. The report should detail the employee's name and the type of transaction recorded. The District Clerk will not be using the CLMS for the actual receipting of payments. The District Clerk will continue to use Odyssey for receipting transactions, however, both will want to know what type of transaction was performed by employee (i.e. 3 passport applications accepted and 3 photographs taken, new case opened, certified copy provided, payment accepted on case, etc.).

5.15.2 The proposed system shall allow all reports and logs to be printed to local and network printers.

5.15.3 Vendor shall describe the common reports that are available to the County and include the type of report, the information provided in the report, the frequency of the report, the process to request the report, and the process used to deliver the report. Vendors are encouraged to include a sampling of common reports. In addition, Vendor shall describe its capabilities to provide customization of reports (either by CSCD, District Clerk or Vendor) as may be required. This description shall include integrated reporting against all entry points.

5.15.3.1 Provide real time and historical reporting tools.

5.15.3.2 Provide the capability for customized reports via report generating tools such as Crystal Reports or MS Excel. Provide the cost of Crystal report software that needs to be bundled with this response.

5.15.3.3 Provide management information and reporting to allow the County to manage the overall CSLM in terms of:

5.15.3.3.1 Estimate of customer needs from source lists;

5.15.3.3.2 Reports on estimating customer needs on a quarterly, monthly, weekly, and daily basis;

5.15.3.3.3 Reports on clerk information related to customer requests;

5.15.3.3.4 Reports for budgeting purposes;

5.15.3.3.5 Reporting to assist the clerk in defending any customer challenge;

5.15.3.3.6 Report data to establish workload requirements that drive staffing needs and allocation;

5.15.3.3.7 Metrics reporting for performance and outcome measures, including standard reports such as "Transaction Time" reporting per clerk, and "Wait Time" reports. These reports will be invaluable to Collin County to gather metrics in order to determine total customer experience; and

5.15.3.3.8 Reports on customers serviced in less than 15 seconds (or 30 seconds, etc.) to help determine the number of customers that might not have been helped, re-directed to other departments, customers at the wrong physical location, etc.

5.16 Interactive Web Functionality Requirements

5.16.1 A web based application will need to support at least 72,000 hits per year for all locations of the County. The Vendor's proposal shall provide benchmark testing as to the number of concurrent users accessing the system at the same time without adversely affecting the response time and system performance.

5.16.2 Ability to connect to remote databases.

5.16.3 Since this is a public facing system, the proposed web application shall have safeguards in place to prevent all data mining from the website.

5.16.4 The Vendor shall be responsible for installing and configuring the web application.

5.16.5 The Vendor shall train clerk and IT staff on routine maintenance of the web application – backup/restore procedures, installing of new releases, etc.

5.17 System Installation and Testing Plans

5.17.1 Vendor shall install, configure, test and make operational the Vendor's system in the County's technology environment.

5.17.2 System Testing

5.17.2.1 Provide a sample checklist for system testing. This is a test for system operations, features, application integration, telephone set testing, etc.

5.17.1.2 For System Acceptance Testing, the Vendor will provide a test plan to verify that the system has performed to functional requirements.

5.18 Implementation Requirements

5.18.1 The vendor will supply a certified Project Manager who will work with Collin County for the duration of this project.

5.18.2 The vendor shall be onsite for the week of Go-Live. The vendor shall supply enough personnel to cover the Collin County locations.

5.19 Training Requirements

5.19.1 Onsite system training shall be provided by the vendor to the.

5.19.2 Onsite training for kiosk use and maintenance shall be provided by the vendor.

5.20 Availability of Proposed System, Equipment, and Software

5.20.1 In order to be considered, the equipment proposed herein shall be of current manufacture. Collin County will procure standard hardware (servers/disk storage) based on the vendor's proposed environment.

5.20.2 Any software licenses (i.e. Microsoft SQL or SSL certificates) shall be specified by the Vendor. Collin County will procure this software and licensing. Vendor shall demonstrate to the County's satisfaction that the system and equipment being proposed are main products of his/her respective manufacturers and that the system and equipment will likely remain as main products with continuous development and improvement over the next five (5) years.

5.20.3 Vendor's proposal shall identify all barcode scanning equipment and/or other equipment and procedures necessary for customer check-in and check-out. Outline the hardware (e.g. scanner, barcode reader, peripheral devices, etc.) and imaging software technologies to be used to capture and process the data.

5.20.4 The vendor's proposal must explain how barcode technology will be used in the system.

5.21 Standards for Equipment and Materials

5.21.1 All purchased equipment and materials shall be new, not used or refurbished. All equipment, components, materials and software provided shall be the latest models and versions and shall conform to current applicable industry standards. Defective or damaged equipment and materials shall be replaced or repaired, prior to final system acceptance, in a manner that meets the approval of the Collin County and at no additional cost.

5.21.2 Any software licenses (i.e. Microsoft SQL or SSL certificates) shall be specified by the Vendor. Collin County will procure this software and licensing.

5.21.3 Collin County will procure standard hardware (servers/disk storage) based on the vendor's proposed environment.

5.21.4 During the Warranty Period (which will begin upon Acceptance of the Work) in accordance with the Contract Terms and Conditions) and during any subsequent Vendor-provided maintenance period, Vendor may provide replacement of defective equipment/components with new equipment/components that is functionally and aesthetically equivalent to new equipment/components. Such replacement equipment/components shall be of equal or greater performance characteristics, engineering/design levels, and appearance than replaced equipment/components.

6.0 PROPOSAL FORMAT

- 6.1 The proposal shall, at a minimum, include a Table of Contents detailing sections and corresponding page numbers, and shall be printed on letter-size (8 1/2" x 11") paper and if submitting manually, assembled with spiral-type bindings or staples. DO NOT USE METAL-RING HARD COVER BINDERS.

Responsive proposals shall provide straightforward, concise information that satisfies the requirements of this solicitation. Responsive proposals will display conformity to Collin County's instructions, requirements of this solicitation and the completeness and clarity of content.

6.2 EXECUTIVE SUMMARY

The Vendor shall provide an Executive Summary of its proposal. The Executive Summary shall be a high-level general overview of how the Vendor proposes to accomplish the requirements of this RFP. The Executive Summary shall demonstrate the Vendor understands of the basic requirements and expectations of the RFP.

6.2.1 FIRM OVERVIEW

The vendor is requested to define the overall structure of the Firm to include the following:

- 6.2.1.1 A descriptive background of your company's history.
- 6.2.1.2 State your principal business location and any other service locations.
- 6.2.1.3 What is your primary line of business?
- 6.2.1.4 How long have you been selling product(s) and/or providing service(s)?
- 6.2.1.5 State how many and the locations where your product/services are in use.
- 6.2.1.6 Vendor shall demonstrate to the County's satisfaction that the system and equipment being proposed are main products its respective manufacturers and that the system and equipment will likely remain as main products with continuous development and improvement over the next five (5) years.

6.3 PROJECT PLAN AND METHODOLOGY

Vendor shall provide a response for each statement below.

6.3.1 Vendor shall provide a specific, detailed project plan that describes how the Vendor intends to provide the requested services which are set forth in this Scope of Work (SOW). Explain, in full detail, how the Vendor will meet all the needs of Collin County detailed in the SOW. Vendor should not summarize its services in this section. Rather, explain exactly how the Vendor can meet the County's needs. If applicable, include items such as technical details and descriptions, key personnel, implementation

plans, customer service, timetables, deliverables, ongoing communication with the County.

6.3.2 As part of the Work Plan and Methodology, as applicable to this SOW, Vendor should respond to the SOW requirements (Section 5.12) item by item and explain how the Vendor can/cannot meet each requirement of the SOW.

6.3.3 Vendor should demonstrate a clear understanding of the tasks and the potential problems in meeting the SOW requirements. The Vendor should include a statement and discussion of anticipated major difficulties and problem areas, together with potential or recommended approaches for their solution.

6.3.4 Vendor shall respond to all elements of the RFP and SOW. In particular, Vendor's response should include specific information, documents, submittals, or responses that address the matters listed in the following table.

6.4 **TECHNICAL RESPONSE**

RFP RESPONSE SHALL INCLUDE THE FOLLOWING:

6.4.1 Descriptions of any additional technologies, features, or functionality offered by the Vendor and a statement of what services or efficiencies those technologies would provide.

6.4.2 Outline system capacity and system requirements, performance and application processing benchmarks.

6.4.3 Provide workflow diagrams of all system requirements (including servers and server disk space), implementation plans and customer service procedures.

6.4.4 Provide a brief high-level summary and diagram of the proposed system's architecture. Identify the concept approach behind the system architecture. Provide a high level description of the system design (including system and network topology) for the proposed system to account for all equipment, hardware, software and infrastructure components. Provide a schematic drawing showing relationship and configuration of software and hardware devices that may be included in a Technical Design Document. Provide database schema with data dictionary which may be included in Technical Design Document.

6.4.5 Describe any SSL Protocol required to provide security for any Web components.

6.4.6 Identify the process to include County customizations to the baseline CLMS.

6.4.7 Describe Vendor's solution to storing statistics on customer volume, and customer throughput handling based on individual clerk (total time spent on each customer per clerk).

6.4.8 Proposed system's access and security control, including the types of access permitted to include County system administrator roles (i.e., support staff, management staff, and system administration staff). Sample activity logs of all clerk activities within the system should be preserved.

6.4.9 Describe in detail your disaster recovery plan. This should include recommended backup and recovery plans. It should also include scenarios such as what would happen in the event of a total power failure in the County offices.

6.4.10 Provide description of the common reports that are available to the Collin County. Include type of report, information provided in the report, the frequency of the report, the process to request the report, and the process used to deliver the report. Include a sampling of common reports. Describe capabilities to provide customization of reports.

6.4.11 Provide real time and historical reporting tools. Provide sample reports.

6.4.12 Provide sample system acceptance test plan.

6.4.13 Provide a sample checklist for system testing.

6.4.14 Provide a draft project plan (GANTT Chart) in MS project or other suitable format that describes the project level tasks, sub-tasks, duration, resources and appropriate dependencies.

6.4.15 Provide brochures and manuals providing technical specifications.

6.4.16 Provide clear and accurate photographs or drawings of all equipment cabinets or kiosks (including internal layouts); if the literature, photographs or drawings differ in any manner from the systems and equipment being proposed, such differences shall be explained in detail.

6.4.17 Outline any hardware (e.g. scanner, barcode reader, peripheral devices, etc.) and imaging software technologies to be used to capture and process data.

6.5 STANDARDS FOR EQUIPMENT AND MATERIALS

6.5.2 During the Warranty Period (which will begin upon Acceptance of the Work) in accordance with the Contract Terms and Conditions) and during any subsequent Vendor-provided maintenance period, Vendor may provide replacement of defective equipment/components with new equipment/components that is functionally and aesthetically equivalent to new. Such replacement equipment/components shall be of equal or greater performance characteristics, engineering/design levels, and appearance than replaced equipment/components.

6.6 ADDITIONAL EQUIPMENT

6.6.1 Vendor's proposal to identify all barcode scanning equipment and/or other equipment and procedures necessary for customer check-in and check-out. Outline the hardware (e.g. scanner, barcode reader, peripheral devices, etc.) and imaging software technologies to be used to capture and process the data. The vendor's proposal must explain how barcode technology will be used in the system.

6.7 PRICING/FEES

6.7.1 Provide an explanation of the total cost of the product/system/service for Collin County. Include itemized pricing hardware, software, installation, training, warranty and any other necessary modifications.

6.7.2 Provide an explanation of the pricing for optional features to support the administrative mobile tablet or tablet PC (5.12.1.3).

6.7.3 Provide pricing for CSCD. Please note this location is not included in the current budget. The County reserves the right to add this equipment at a later date if approved in budget. Please make sure to include any additional "back end" equipment that will be needed in your pricing.

**SIGNATURE FORM
COLLIN COUNTY, TEXAS**

DELIVERY WILL BE F.O.B. INSIDE DELIVERY AT COLLIN COUNTY DESIGNATED LOCATIONS AND ALL TRANSPORTATION CHARGES PAID BY THE SUPPLIER TO DESTINATION.

DELIVERY TO BE SPECIFIED IN CALENDAR DAYS FROM DATE OF ORDER.

WE **DO NOT** TAKE EXCEPTION TO THE BID SPECIFICATIONS.

WE **TAKE** EXCEPTION TO THE BID SPECIFICATIONS (EXPLAIN):

COMPANY INFORMATION/PROFILE/REFERENCES

Preferential Requirement: The County of Collin, as a governmental agency of the State of Texas, may not award a contract to a nonresident bidder unless the nonresident's bid is lower than the lowest bid submitted by a responsible Texas resident bidder by the same amount that a Texas resident bidder would be required to underbid a nonresident bidder to obtain a comparable contract in the state in which the nonresident's principal place of business is located (Government Code, Title 10, V.T.C.A., Chapter 2252, Subchapter A). Bidder shall make answer to the following questions by selecting the appropriate radio button or inserting information in the box provided:

Is your principal place of business in the State of Texas? Yes No

If the answer to question is "yes", no further information is

necessary; if "no", please indicate:

in which state is your principal place of business is located:

if that state favors resident bidders (bidders in your state) by some dollar increment or percentage:

Yes No

if "yes", what is that dollar increment or percentage?

Company Profile: IS YOUR FIRM?

Sole Proprietorship

Yes No

General Partnership

Yes No

Limited Partnership

Yes No

Corporation

Yes No

Other

Yes No

List Legal Names in Company:

List at least three (3) companies or governmental agencies where these same/like products/services, as stated herein, have been provided. Include company name, address, contact name and telephone number.

AS PERMITTED UNDER TITLE 8, CHAPTER 271, SUBCHAPTER F, SECTION 271.101 AND 271.102 V.T.C.A. AND TITLE 7, CHAPTER 791, SUBCHAPTER C, SECTION 791.025, V.T.C.A., OTHER LOCAL GOVERNMENTAL ENTITIES MAY WISH TO ALSO PARTICIPATE UNDER THE SAME TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT. EACH ENTITY WISHING TO PARTICIPATE MUST ENTER INTO AN INTERLOCAL AGREEMENT WITH COLLIN COUNTY AND HAVE PRIOR AUTHORIZATION FROM VENDOR. IF SUCH PARTICIPATION IS AUTHORIZED, ALL PURCHASE ORDERS WILL BE ISSUED DIRECTLY FROM AND SHIPPED DIRECTLY TO THE LOCAL GOVERNMENTAL ENTITY REQUIRING SUPPLIES/SERVICES. COLLIN COUNTY SHALL NOT BE HELD RESPONSIBLE FOR ANY ORDERS PLACED, DELIVERIES MADE OR PAYMENT FOR SUPPLIES/SERVICES ORDERED BY THESE ENTITIES. EACH ENTITY RESERVES THE RIGHT TO DETERMINE THEIR PARTICIPATION IN THIS CONTRACT. WOULD BIDDER BE WILLING TO ALLOW OTHER LOCAL GOVERNMENTAL ENTITIES TO PARTICIPATE IN THIS CONTRACT, IF AWARDED, UNDER THE SAME TERMS AND CONDITIONS? Yes No

By signing and submitting this Bid/Proposal, Bidder/Offeror acknowledges, understands the specifications, any and all addenda, and agrees to the bid/proposal terms and conditions and can provide the minimum requirements stated herein. Bidder/Offeror acknowledges they have read the document in its entirety, visited the site, performed investigations and verifications as deemed necessary, is familiar with local conditions under which work is to be performed and will be responsible for any and all errors in Bid/Proposal submittal resulting from Bidder/Offeror's failure to do so. Bidder/Offeror acknowledges the prices submitted in this Bid/Proposal have been carefully reviewed and are submitted as correct and final. If Bid/Proposal is accepted, vendor further certifies and agrees to furnish any and all products/services upon which prices are extended at the price submitted, and upon conditions in the specifications of the Invitation for Bid/Request for Proposal.

THE UNDERSIGNED HEREBY CERTIFIES THE FOREGOING BID/PROPOSAL SUBMITTED BY THE COMPANY LISTED BELOW HEREINAFTER CALLED "BIDDER/OFFEROR" IS THE DULY AUTHORIZED AGENT OF SAID COMPANY AND THE PERSON SIGNING SAID BID/PROPOSAL HAS BEEN DULY AUTHORIZED TO EXECUTE SAME. BIDDER/OFFEROR AFFIRMS THAT THEY ARE DULY AUTHORIZED TO EXECUTE THIS CONTRACT; THIS COMPANY; CORPORATION, FIRM, PARTNERSHIP OR INDIVIDUAL HAS NOT PREPARED THIS BID/PROPOSAL IN COLLUSION WITH ANY OTHER BIDDER/OFFEROR OR OTHER PERSON OR PERSONS ENGAGED IN THE SAME LINE OF BUSINESS; AND THAT THE CONTENTS OF THIS BID/PROPOSAL AS TO PRICES, TERMS AND CONDITIONS OF SAID BID/PROPOSAL HAVE NOT BEEN COMMUNICATED BY THE UNDERSIGNED NOR BY ANY EMPLOYEE OR AGENT TO ANY OTHER PERSON ENGAGED IN THIS TYPE OF BUSINESS PRIOR TO THE OFFICIAL OPENING OF THIS BID/PROPOSAL.

Company Name	<input type="text"/>
Street Address of Principal Place of Business	<input type="text"/>
City, State, Zip	<input type="text"/>
Phone of Principal Place of Business	<input type="text"/>
Fax of Principal Place of Business	<input type="text"/>

E-mail Address of Representative	<input type="text"/>
Federal Identification Number	<input type="text"/>
Date	<input type="text"/>
Acknowledgement of Addenda	#1 <input type="checkbox"/> #2 <input type="checkbox"/> #3 <input type="checkbox"/> #4 <input type="checkbox"/> #5 <input type="checkbox"/> #6 <input type="checkbox"/>
Authorized Representative Name	<input type="text"/>
Authorized Representative Title	<input type="text"/>
Signature (Required for paper bid submission)	<input type="text"/>

CONFLICT OF INTEREST QUESTIONNAIRE FORM CIQ For vendor or other person doing business with local governmental entity	
<p>This questionnaire is being filed in accordance with chapter 176 of the Local Government Code by a person doing business with the governmental entity.</p> <p>By law this questionnaire must be filed with the records administrator of the local government 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 violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.</p>	OFFICE USE ONLY Date Received
1	<p>Name of person doing business with local governmental entity.</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
2	<p><input type="checkbox"/> Check this box if you are filing an update to a previously filed questionnaire.</p> <p>(The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than September 1 of the year for which an activity described in Section 176.006(a), Local Government Code, is pending and not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)</p>
3	<p>Name each employee or contractor of the local governmental entity who makes recommendations to a local government officer of the governmental entity with respect to expenditures of money AND describe the affiliation or business relationship.</p> <div style="border: 1px solid black; height: 80px; width: 100%;"></div>
4	<p>Name each local government officer who appoints or employs local government officers of the governmental entity for which this questionnaire is filed AND describe the affiliation or business relationship.</p> <div style="border: 1px solid black; height: 80px; width: 100%;"></div>

Adopted 11/02/2005

FORM CIQ

CONFLICT OF INTEREST QUESTIONNAIRE

Page 2

For vendor or other person doing business with local governmental entity

5 **Name of local government officer with whom filer has affiliation or business relationship.
(Complete this section only if the answer to A, B, or C is YES.**

This section, item 5 including subparts A, B, C & D, must be completed for each officer with whom the filer has affiliation or other relationship. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income from the filer of the questionnaire? Yes No

B. Is the filer of the questionnaire receiving or likely to receive taxable income from or at the direction of the local government officer named in this section AND the taxable income is not from the local governmental entity? Yes No

C. Is the filer of this questionnaire affiliated with a corporation or other business entity that the local government officer serves as an officer or director, or holds an ownership of 10 percent or more? Yes No

D. Describe each affiliation or business relationship.

6

Signature of person doing business with the governmental entity Date

Adopted 11/02/2005

AFFIDAVIT OF COMPLIANCE

I, the undersigned, declare and affirm that my company is in compliance with the Immigration and Reform Act of 1986 and all employees are legally eligible to work in the United States of America.

I further understand and acknowledge that any non-compliance with the Immigration and Reform Act of 1986 at any time during the term of this contract will render the contract voidable.

Name of Company

Title of Officer

Name of Officer

Date:

In order to better serve our bidders, the Collin County Purchasing Department is conducting the following survey. We appreciate your time and effort expended to submit your bid. Please take a moment to complete the below. Should you have any questions or require more information please call (972) 548-4165.

HOW DID YOU RECEIVE NOTICE OF THIS REQUEST FOR BID OR PROPOSALS?

McKinney Courier-Gazette? Yes No

Plan Room? Yes No

Collin County Web-Site? Yes No

Facsimile or email from BidSync? Yes No

Other

HOW DID YOU RECEIVE THE BID DOCUMENTS?

Downloaded from Home Computer? Yes No

Downloaded from Company Computer? Yes No

Requested a Copy from Collin County? Yes No

Other

Thank You,

Collin County Purchasing Department

Question and Answers for Bid #2013-295 - Customer Line (Queuing) Management System

OVERALL BID QUESTIONS

There are no questions associated with this bid. If you would like to submit a question, please click on the "Create New Question" button below.