

REQUEST FOR PROPOSALS

ISSUE DATE: June 14, 2007
 CLOSING DATE: June 27, 2007, 2:00 PM Eastern Time
 TITLE: Web Application Development Services
 RFP #: CSC-070614

ISSUED BY: Christian Service Charities Human Service Charities of America Medical Research Charities Neighbor To Nation	CONTACT: John Longo Senior Communications Associate jlongo@neighbortonation.org 571.722.1064
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Sealed proposals will be received until 2:00 p.m., June 27, 2007 for furnishing the services described herein.

Mail to: Web Application Development Proposal ATTN: John Longo, Senior Communications Assoc. 7620 Little River Turnpike, Suite 600 Annandale, VA 22003	If proposals are hand delivered, deliver to: John Longo, Senior Communications Associate 7620 Little River Turnpike, Suite 600 Annandale, VA 22003
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In Compliance With This Request For Proposal And To All The Conditions Imposed Therein And Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Services In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiations.

Full, Legal Name and Address of Firm:

Date: _____

By: _____
(Signature in Ink)

Name: _____

City/State: _____ Zip Code: _____

Title: _____

FEI/FIN NO.: _____

Telephone Number: (____) _____

E-mail address: _____

Fax Number: (____) _____

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1.0 Purpose

The purpose of this Request for Proposal (RFP) is to obtain the services of a qualified Web Application Development firm to provide a Web Application to replace and upgrade our current system's capabilities.

The purpose of this project is to build a complete Web-based and Database-driven Content Management System (CMS) application, corresponding Websites, and Web application interfaces.

Using the working title "Signet," this system will be a completely online-accessible application, allowing staff to access to information and functionality, including administrative functions, regardless of location. This system will manage and operate the various Websites, Website components, and applications needed as part of the Signet project. One necessary component is a secure analytics tool for tracking and analyzing financial information.

The Signet System is an organization-wide IT solution that will replace processes currently controlled by 2 or more separate systems. Signet primarily refers to:

1. A Microsoft SQL Server Database which will house organizational information of financial, administrative, and operational significance.
2. A Web-based front-end interface that will give staff:
 - a. Access to information, history, and analytical tools
 - b. Administrative capabilities for content and basic structural/formatting editing.

Additionally, Signet will power CSC, HSCA, MRC and NTN's Websites with the information it stores, and offer both the general public and our members additional tools and information to better connect them with our services.

All services shall be provided in accordance with the specifications contained herein and attached hereto, unless otherwise explicitly agreed to.

1.1 Definition of Parties

This solicitation is issued by the collective group of Christian Service Charities, Human Service Charities of America, Medical Research Charities, and Neighbor To Nation; herein referred to collectively for convenience as "The Group."

For ease of reference, each organization submitting a response to the Request for Proposal will hereinafter be referred to as an "Offeror." An Offeror whose proposal would result in a formal agreement will hereinafter be referred to as a "Contractor."

1.2 Contract Documentation

The contents of the proposal submitted by the successful Offeror, this RFP (including general and special terms and conditions), and all modifications made thereof, will become part of any contract awarded as a result of this solicitation. The successful firms will be required to sign a contract with The Group.

2.0 Background

2.1 The Group

The Group is an affiliation of 3 affinity federations tracking and managing the accounts of more than 130 individual non-profit agencies. Additionally, Neighbor To Nation itself is a fourth federation created specifically to manage the fund raising process at the State level for the 3 affinity federations. The federations' primary purpose is to raise funds from Federal, State, local, and private sector employees on behalf of their respective memberships.

The Neighbor to Nation group currently operates as 3 distinct federations with 4 distinct Websites.

2.1.1 Federations

- Christian Service Charities
- Human Service Charities of America
- Medical Research Charities

2.1.2 Websites

- Neighbor to Nation (www.neighbortonation.org)
- Christian Service Charities (www.christianservicecharities.org)
- Human Service Charities of America (www.hsca.org)
- Medical Research Charities (www.medicalresearchcharities.org)

The IT Systems that drive the federations' day-to-day business need to be replaced for a variety of reasons. Primary among these is our dependence upon ClearVantage, which was acquired in 2001 and implemented in early 2002. Over time, CSC's database needs have changed dramatically, thereby outgrowing our former solution's capabilities. Examples of our changing needs are highlighted by two areas to which the current solution does not adapt well:

1. Workflow and process adherence.
2. The Group's increased offering of technology-based services.
3. The Group's move to a paperless application.

2.2 System User Requests

Any replacement system must improve our capabilities and user experiences in the following areas:

2.2.1 Usability:

1. Navigation:
 - a. Most users have expressed frustration, finding it difficult at times to discern navigation routes within the current application.

- b. All users, regardless of role (e.g. power-user, system administrator, standard user, etc.) must have simple, consistent, and useful navigation options.
- c. Signet will be designed with usability as a foremost concern, customized to staff needs and its usability will be subject to staff approval.

2.2.2 Expandability:

- 1. Our current application is licensed through an outside vendor, requiring significant time, effort, and cost for all modifications to be implemented.
- 2. The new system will be designed so that additions or changes to the application's source code and functional modules can be made by The Group's technical staff.

2.2.3 Cost and Ownership:

- 1. The Group expends a great deal of resources (time and money) on the current application. It is important that the new application will alleviate a significant amount of this financial burden through The Group's:
 - a. Ownership of the source code and associated files.
 - b. Ability to modify and adapt the application with internal resources.
- 2. The Offeror will agree to provide The Group with copies and ownership of all source code and associated files for the resulting application, with the authorization for The Group to make modifications at our own discretion.

2.2.4 Workflow Compliance and Data Integrity:

Workflow Compliance and Data Integrity are high-profile and critical requirements for the resultant system.

- 1. The current application lacks proper safeties and controls for the data stored in a database.
- 2. The new application will not unnecessarily duplicate, delete, or otherwise corrupt data.
 - a. Appropriate programmatic logic and user control will prevent application workflow from becoming corrupt and ineffective.

2.2.5 The Group's Federation Websites

The Federations' Websites were originally designed to be powered by ClearVantage. The outgoing system is cumbersome.

- 1. The dynamic pages are driven by DLL files written in Pascal.

- a. These pages require substantial memory resources and are difficult and expensive to maintain.
2. A redesign of these pages, the processes that they engage in and the manner in which data is structured is absolutely necessary.
 - a. The Group will provide wireframes; however the contractor will create and implement UI.
 - b. The new system will provide for simplified maintenance and efficiency.

2.2.6 PledgeNet

PledgeNet (www.pledgenet.org), The Group's pledge and contribution tracking/analysis tool, is also in need of attention. New attention to usability and data validation are necessary.

PledgeNet is currently written in ColdFusion and maintained on-site. However, it is very much a separate system, with its own login and separate database. While a separate database may be included for the new solution, the integration of the system into the member pages must be seamless. In addition the system must include staff specific tools that allow them to compare charities, campaigns, and federation performance.

A new system is needed that will provide staff the ability to efficiently enter pledge information and analyze it; and additionally give member charities tools to analyze their own campaign performance.

Offerors will submit a technical approach and separate line-item cost for how they propose to alleviate the issue of replacement or integration.

2.3 Working Environment

The Group prefers to develop a close working relationship with our partners in development endeavors. The Group may make space available at our Annandale, VA offices for a small development team, including access to appropriate technical and human resources during the engagement.

3.0 Scope of Services

The Contractor shall furnish all necessary labor, materials and supplies to accomplish the required services. Services are to include, but not be limited to those listed and outlined herein.

The Consultant must provide professional project management and development staff at appropriate levels of competency for each segment of work completed.

3.1 Scope Definitions

3.1.1 Key Scope Inclusions

- The Group will provide the following:
 - Site map listing of pages
 - Wireframe diagrams
 - PDF, Word, and other downloadable documents
 - Logo and other necessary Group graphical materials
 - Designs and color schemes
 - Server for development, testing, staging, and live applications
- The following tasks are specifically required to be performed by the contractor:
 - Application architecture
 - Database design and development
 - Data access tier development
 - Business logic based on The Group's internal processes
 - Web application logic to generate UI
 - Any application-specific CSS, images, or other UI items
 - Appropriate security and privacy control mechanisms, including a system to control user access privileges based on roles and responsibilities
 - Migration of legacy data from old system to new

3.1.2 Key Scope Exclusions

- The following items are specifically **not** required to be performed by the contractor:
 1. Web UI Wireframes
 2. Process reengineering

3.2 Contractor Tasks

3.2.1 Project Management

Contractor will provide weekly status updates to The Group's POC.

The development will fall into five phases, each of which is detailed in the Web Application Development section and has a milestone completion date:

Phase I: Database Development, Specific Member and Signet Pages	Completed by August 1, 2007.
Phase II: Specific Member and Signet Pages	Completed by September 1, 2007
Phase III: Specific Member and Signet Pages	Completed by October 1, 2007
Phase IV: Financial Information System	Completed by December 1, 2007
Phase V: Final Implementation	Completed by January 1, 2008

3.2.2 Web Application Development

3.2.2.1 Development Environment

The Offeror must justify the choice of development environment. The website must be developed and hosted using industry standard, commercially available tools. The Offeror must list all tools to be used to develop and maintain the website, as well as the hosting platform hardware and software.

All work must be done on The Group's development environment, using developer hardware provided by the Offeror.

The Offeror must use all reasonable care to protect the integrity of the software during development. Use of a version and library control tool such as Microsoft Visual Source Safe is desired. The Offeror must describe the development environment to be used.

3.2.2.2 Development Standards

Required

- All Web applications will perform 100% in IE6 and newer browsers.
- XHTML 1.1 and CSS 2.0
- Common, current industry-standard programming language (e.g. C#, VB.Net, Java, Perl/PHP)

- Latest version of development tools (e.g. VS 2005, etc.) and environment (e.g. .Net 3.0, etc.)
- Common, consistent, best-practice coding standards will be used, including consistency in naming conventions, use of appropriate data types, modular development, and appropriately commented code.

Desirable

- Cross-browser capability is highly desirable.
- The Group does not require adherence to the Federal standards for website accessibility as defined in Section 508 of the Rehabilitation Act of 1973.
 - An accessible Web application is highly desirable.
 - Adherence to the World Wide Web Consortium (W3C) Web Content Accessibility Guidelines 1.0 (<http://www.w3.org/TR/WCAG10/checkpoint-list.html>) can be tested with a commercially available accessibility monitor, and with a leading accessibility tool such as JAWS.

3.2.2.3 Development Phases

3.2.2.3.1 PHASE I – August 1, 2007

Database Development

1. Creation of MS SQL Database
2. Data Migration

Member Pages

1. View/RSVP for Campaign Events – This component allows a charity to view events that are relevant to their charity and then RSVP to them if interested in attending.
 - a. This component must be integrated into the current website structure.

Signet Pages

The back-end of the system (Signet) will serve many different functions throughout the various phases of this development. These functions will include managing the content on the website front-end, managing the charities, and administering the different sites with logins and access controls. The later phases will also provide administrative controls and other components from having a blog component, conference module, and office administration.

1. The Signet Home page must be implemented with staff login required.
2. Establish Communications Ability
 - a. Signet should be able to send emails as notifications to staff for a variety of processes
3. Charity Information Hub

- a. Should allow staff to search/view/edit charity information
 - b. Should provide basic analytic tools to examine charity's performance
 - c. Should allow staff to add/delete charities
 - d. Should allow staff to track and add to contact history
- 4. Campaign Information Hub
 - a. Should allow staff to search/view/edit campaign information
 - b. Should provide basic analytic tools to examine campaign performance
 - c. Should allow staff to add/delete campaigns
 - d. Should allow staff to track and add to contact history
 - e. Should allow staff to track events sponsored by campaigns
- 5. Events Hub
 - a. Staff should be able to add events, coordinate them with campaigns and post them to the View/RSVP for Campaign Events member page.
 - b. Should provide basic analytic tools to examine events and member/staff attendance.
 - c. Should notify staff when charities RSVP for an event
- 6. Federation Hub
 - a. Should allow staff to search/view/edit federation information
 - b. Should track vital staff information

3.2.2.3.2 PHASE II - September 1, 2007

Public Pages

- 1. Home Page
- 2. About Us Page
 - a. Board Page
- 3. Contact Us Page
- 4. Donate Page
- 5. Resources for Charities
 - a. Become a Member
- 6. Learn About Our Charities
 - a. Detail Page – Details about the Charity
 - b. Charity Reporting Page – A Report about the Charity
- 7. Charity/Board Login
 - a. Login Should be integrated in banner
 - b. Leads to Member Home

Member Pages

- 1. Member Home – The Member Home should be able to display basic information about the member's charity (pledge totals, contact info etc.)
- 2. Pledge Net – Phase I should see seamless access to the Pledge Net system without a redundant login
- 3. Download Donor Names – As part of the system, people donate to the various charities and this system will allow the charity to download a listing of donor names that have made donations. The system will track who those donors are through the donor name entry component on the back-end. Each time a set of donors is downloaded, each donor record will be marked as downloaded.

4. View/Edit Charity Details - This portion of the charity module allows the charity to update their information. When a charity updates their information – this information would need to be approved by the administrator and then would become the information that appears as part of the charity detail page.
5. View/Edit Contact Details – This portion of the charity module allows the charity to update other components of their information and the same workflow applies as above – where the system administrator would need to approve the changes prior to it becoming live on the site.

Signet Pages

1. System Administration Module – This module should track activity with Signet and allow administrators to manage access and performance.
2. Office Administration Hub – These pages should provide staff access to various basic office functions
 - a. Enter Training Requests
 - b. Enter Payment Requests
 - c. Enter Expense Reports
 - d. Enter Leave Requests
 - e. Enter Monthly Reports
3. Web Administration Hub – These pages should allow staff to make basic changes to the public and member websites.
 - a. Change Text
 - b. Swap Images
 - c. Activate/Deactivate Pages

3.2.2.3.3 PHASE III – October 1, 2007

Member Pages

1. 2008 Member Application – This is a module that allows a charity to officially apply for membership to the federation.
 - a. Review/Edit Basic Charity Information
 - b. Upload necessary documents in a variety of formats
 - i. IRS 990
 - ii. Articles of Incorporation
 - iii. By Laws
 - iv. Annual Reports
 - v. Other Documents as necessary
 - c. Enter a Description of Services
 - i. View Last Year's DOS
 - ii. Enter a new service
 - d. Download a variety of documents, dynamically prepared for each individual charity.

Signet Pages

1. Application Administration
 - a. Staff should be able to track and manage applications as they are completed.

- b. Staff should be able to create PDF documents that are dynamically prepared for each charity.

3.2.2.3.4 PHASE IV – December 1, 2007

Phase IV will focus a new financial information system. This includes developing a new version of Pledge Net, an application which tracks pledges and distributions for charities and federation staff.

Member Pages

- 1. PledgeNet
 - a. Pledge and Contribution Reporting Pages
 - i. Pledge Summary Report
 - 1. Displays a year to year comparison of gross pledges
 - ii. Distribution Report
 - 1. Displays gross pledges, monthly distributions, and disbursement totals
 - iii. Distribution Comparison
 - 1. Displays same as distribution report but across several years
 - iv. Pledge Comparison Report
 - 1. Displays pledges by campaign across multiple years
 - v. Pledges by State Report
 - 1. Displays gross pledges by state, and percentage of federation pledges
 - vi. Pledges by Campaign Report
 - 1. Displays pledges by campaign, and percentage of federation pledges

Signet Pages

- 1. PledgeNet Administration
 - a. Staff must have access to all of the reports detailed in 3.2.2.3.4.1.a that reflect federation-wide information.
 - b. Admin Pages
 - i. Pledge Entry
 - 1. Staff must be able to enter pledges by campaign.
 - ii. Distribution
 - 1. Staff must be able to record deposits made to member charities

3.2.2.3.5 PHASE V – January 1, 2007

Phase V will exist to implement any lingering applications, address enhancements, and add non-critical applications such as a volunteer tracking system, and downloadable campaign kits.

Public Pages

- 1. Resources for Volunteers
 - a. Volunteer Registration
 - i. Collect basic contact information about the volunteer
 - ii. Create a username and password
 - b. Volunteer Home
 - i. Allow a volunteers to identify member charities or federations for which they would like to volunteer

- ii. Allow volunteers to search charities by location (city, state, or zip)
 - iii. Allow volunteers to view volunteer history
- 2. Resources for Employers
 - a. Employer Registration
 - i. Collect Basic contact information about the employer
 - ii. Create a username and password
 - b. Employer Home
 - i. Allow Employers to download a free campaign toolkit (.zip file)
 - ii. Allow Employers to request more advanced campaign assistance

Member Pages

- 1. Volunteer System Registration
 - a. Participation in the volunteer system is optional. Members must have a way to register for the service,
- 2. Volunteer HQ
 - a. Members must be able to enter a volunteer profile and description of volunteer work available
 - b. Members must be able to search volunteers and contact them through the system, by email if possible
 - c. Members must be able to track volunteer history

Signet Pages

- 1. Volunteer System Administration
 - a. Staff must be able to track volunteer activity
 - b. Staff must be able to add or remove a volunteer
 - c. Although the system should be completely automated, staff must be able to communicate with volunteers and participating members
- 2. Employer Resource Administration
 - a. Staff must be able to upload different types of toolkits (.zip files)
 - b. Staff must be able to review and communicate with employers
 - c. Staff must be able to track Employer Resource activity and history

Other Pages As Needed

- 1. Project Management and tracking
- 2. Generate Marketing Profiles
- 3. Blog Administration and Posting
- 4. Administrative Tools

3.2.3 Post-Implementation Support

Contractor will provide post-implementation support for the application.

3.2.3.1 Email Support

Contractor will provide email responses to support queries within 24 business hours for one year. A support ticket is defined as a threaded support discussion.

3.2.3.2 Phone Support

Contractor will provide phone support queries during business hours for one year.

Month(s)	Max # of Support Tickets Per Month	Max # of Phone Support Hours Per Month
1-3	Unlimited	24
4-6	6	16
6-9	4	8
10-12	2	4

4.0 Proposal Preparation and Submission Requirements

4.1 General Proposal Requirements

4.1.1 RFP Response

In order to be considered for selection:

- Offerors must submit a complete response to the RFP.
- One (1) original and three (3) copies of Offeror's proposal must be submitted to The Group.
 - Electronic (CD, DVD, or Emailed) copies of proposals in MS Word or PDF forma are not required, but are acceptable **in addition to** hard copies.

4.1.2 Proposal Preparation

All information requested should be submitted. Failure to submit all information requested may result in The Group requiring prompt submission of missing information and/or giving lowered evaluation of the proposal.

- An authorized representative of the Offeror shall sign proposal.
- Proposals which are substantially incomplete or lacking key information may be rejected by The Group.
 - Mandatory requirements are those required by law or specified in the RFP and are such that they cannot be waived and are not subject to negotiation.
- Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP.
 - Emphasis should be placed on completeness and clarity of content.
 - While there is no specified page limit, please recognize that a clear explanation outweighs a long one.
 - While not required, recycled paper products are recommended for printed proposals.
 - Simple 3-ring binders or similar presentation devices are encouraged.
 - Inclusion of flashy marketing materials and "filler" material is strongly discouraged.
- Proposals should be organized in the order in which the requirements are presented in the RFP.
 - All pages of the proposal should be numbered.
 - As much as is practicable, each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite

the paragraph number, and repeat the text of the requirement as it appears in the section of the RFP.

- The proposal should contain a table of contents, which responds to the RFP requirements.
- Information which the Offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material.
- Proposals that are not organized in this manner risk elimination from consideration if The Group's evaluators are unable to find where the RFP requirements are specifically addressed.
- The Offeror's proposal should provide all the information that it considers pertinent to its qualifications for the project and which respond to the Scope of Services described.
 - Reviewers will base their selections only on the contents of the submitted proposals.

4.2 Specific Proposal Requirements

Ensure that all Signatures and Forms are completed and legible:

- Offeror's Proposal
- Certification page
- Any addenda and acknowledgments signed and filled out as required.

The proposal should use the following structure:

4.2.1 Executive Summary

Recommended number of pages: 1

Provide an overview of the offeror's business and a synopsis of the proposal.

4.2.2 Offeror Contact Information

Recommended number of pages: 1

- Location of the Offeror's headquarters and nearest offices.
- Applicable phone, facsimile numbers, and e-mail addresses.
- Any other pertinent information relative to the size and organizational structure of the company.

4.2.3 Key Personnel

Recommended number of pages: 2

- Individual resumes describing the key representative or representatives on behalf of your company.
 - Identify persons authorized to represent the firm.
- Summary resumes describing the relevant qualifications, education, and experience of personnel to be assigned for all tasks.

4.2.4 Subcontractors

Recommended number of pages: 0-1

- List any other Consultants, advisors, and suppliers to be used
- Describe specific responsibilities, qualifications, and background experience of all key personnel.

4.2.5 Offeror's Background

Recommended number of pages: 3-6

4.2.5.1 Offeror's Experience

Recommended number of pages: 1-2 per project

Describe Offeror's previous background and experience relative to The Group's needs.

- Include URLs of publicly available examples.
- Offeror may include screen shots in the proposal.
- Offeror may schedule a meeting at The Group's location to demonstrate their Web Applications.
- Include for 3 similar projects:

4.2.5.1.1 Overview of the engagement

Include details of size, duration, client, and other relevant facts.

4.2.5.1.2 Technical aspects of engagement

Identify the environments, languages, and other technical details of the engagement. Explain how this experience will enhance your ability to provide an acceptable solution for The Group.

4.2.5.1.3 Challenges Met

Identify specific challenges (technical, scheduling, personnel, or other) that you faced during the engagement. Explain how / if you were able to overcome these challenges and how you would alleviate these issues for The Group's project.

4.2.5.2 Past Performance

For each of the previously identified engagements, provide letters of reference from the former or current clients (include names, addresses, phone and fax numbers, and e-mail address of contact persons).

4.2.6 Technical Approach

Recommended number of pages: < 10

4.2.6.1 Overall Approach

The Offeror shall provide a written narrative describing the approach/methodology for providing services to include a description of the Offeror's approach to fulfilling each requirement as listed in Section 3, Scope of Services, while meeting each of the goals stated in Section 2.

Identify the environment(s), languages, and other relevant technical specifications proposed.

- **Important:** It must be clear from the Offeror's response to each requirement they have the personnel, knowledge, and capability to satisfy that requirement or discipline.
- **Important:** Ensure that you are *describing how* you intend to fulfill each of the requirements, not simply *saying that you will* fulfill each of the requirements.

4.2.6.2 Approach to Replacing or Integrating PledgeNet

Identify the proposed solution for replacing or integrating PledgeNet into the new solution.

4.2.7 Technical Requirements

Recommended number of pages: 1

Include a list or matrix that clearly shows:

- Details of recommended platform, development environment, and programming language.
- List of necessary hardware and software necessary for implementation and maintenance.

4.2.8 Management Approach

Recommended number of pages: < 6

The Offeror shall provide a written narrative describing the approach/methodology for providing project management for the duration of the engagement.

Include a high-level project plan indicating phase milestones and key tasks.

Offeror will explain how they intend to ensure they will meet each of the milestones. Offeror must indicate an understanding that there is an immediate need for new public and member pages, explaining how they will ensure these will be complete and implemented by August 1, 2007.

- **Important:** It must be clear from the Offeror's response to each requirement they have the personnel, knowledge, and capability to satisfy the management requirements of the engagement.

- **Important:** Ensure that you are *describing how* you intend to manage various tasks, not simply *saying that* you will manage various tasks.

4.2.9 Cost Proposal

Recommended number of pages: 1

Offeror's proposal shall contain a complete itemized breakdown of all fees associated with providing proposed services. Offerors shall provide the Firm, Fixed Price in the form of a fee schedule for all proposed services as outlined in Section 3.

Any travel undertaken will not be reimbursed by The Group unless specifically agreed to in advance. In such a case, The Group's travel policy shall be adhered to.

Please indicate your payment terms if they are more favorable to The Group than those specified in the "General Conditions and Instructions to Offerors" section.

The Offeror shall include the following in the cost section of the proposal:

"I hereby certify that the price included in this proposal is accurate and binding and that all costs are shown and accurately reflect my total proposal cost."

The Group requests that the following matrix be used to simplify the cost breakdown. Please add or delete rows as necessary for your proposed Firm, Fixed Price.

Cost Item	Cost	Unit of Measure	Quantity	Total
Phase I		Ea	1	
Phase II		Ea	1	
Phase III		Ea	1	
Phase IV		Ea	1	
PledgeNet Replacement or Integration		Ea	1	

5.0 Proposal Evaluation

An Evaluation Team composed of representatives of The Group will review the proposals. The criteria listed below will be used to evaluate proposals for the purpose of ranking them in relative position based on how fully each proposal meets the requirements of this RFP:

- Compliance with the RFP
- Management Approach
- Technical Approach
- References
- Cost

6.0 General Conditions and Instructions to Offerors

Recommended number of pages: N/A – Signature on cover sheet indicates acceptance of conditions and understanding of instructions.

Offeror or their authorized representatives are expected to inform themselves fully as to the conditions, requirements, and specifications before submitting proposals: failure to do so will be at the Offeror's own risk and except as provided by law, relief cannot be secured on the plea of error.

Subject to all Federal, State and local laws, policies, resolutions, regulations, rules, limitations and legislation, proposals on all solicitations issued by Proposal will bind offerors to applicable conditions and requirements herein set forth unless otherwise specified in the solicitation.

AUTHORITY- The Purchasing Agent has the sole responsibility and authority for negotiating, placing, and when necessary modifying this solicitation. In the discharge of these responsibilities, the Purchasing Agent may be assisted. Unless specifically delegated by the Purchasing Agent, no other Group officer or employee is authorized to enter into purchase negotiations or contracts, or in any way obligate The Group for indebtedness. Any purchase order or contract made which is contrary to these provisions and authorities shall be of no effect and void and The Group shall not be bound thereby.

COMPETITION INTENDED: It is The Group's intent that this solicitation permit competition. It shall be the Offeror's responsibility to advise the Purchasing Agent in writing if any language, requirement, specification, etc., or any combination thereof, stifles competition or inadvertently restricts or limits the requirements stated in this solicitation to a single source. The Purchasing Agent must receive such notification not later than five (5) business days prior to the deadline set for acceptance of the proposals.

6.1 Conditions of Bidding

CLARIFICATION OF TERMS - If any Offeror has questions about the specifications or other solicitation documents, the prospective Offeror should contact the buyer whose name appears on the face of the solicitation no later than three (3) business days prior to the date set for the opening of bids or receipt of proposals. Any revisions to the solicitation will be made only by addendum issued by the Buyer. Notifications regarding specifications may not be considered if received in less than three (3) business days of the date set for opening of bids/receipt of proposals.

LATE PROPOSALS & MODIFICATION OF PROPOSALS:

Any proposal/modification received at the office designated in the solicitation after the exact time specified for receipt of the proposal/modification is considered a late proposal/modification.

The Group is not responsible for delays in the delivery of the mail by the U.S. Postal Service, private carriers or the inter-office mail system. It is the sole responsibility of the Offeror to ensure their proposal reaches The Group by the designated date and hour.

The official time used in the receipt of proposals is that time on The Group's representative's primary work computer.

Late proposals/modifications will be returned to the Offeror UNOPENED, if solicitation number, acceptance date and Offeror's return address is shown on the container.

If The Group closes its offices due to inclement weather scheduled bid openings or receipt of proposals will be extended to the next business day, same time.

WITHDRAWAL OF PROPOSALS:

An Offeror for a contract may request withdrawal of his or her proposal under the following circumstances:

Proposals may be withdrawn on written request from the Offeror received at the address shown in the solicitation prior to the time of acceptance.

Requests for withdrawal of proposals after opening of such proposals but prior to award shall be transmitted to the Purchasing Agent, in writing, accompanied by full documentation supporting the request. If the request is based on a claim of error, documentation must show the basis of the error. Such documentation may take the form of supplier quotations, vendor work sheets, etc.

No Proposal may be withdrawn under this paragraph when the result would be the awarding of the contract on another proposal by the same Offeror or of another Offeror in which the ownership of the withdrawing Offeror is more than five percent. No Offeror who is permitted to withdraw a proposal shall, for compensation, supply any material or labor to or perform any subcontract or other work agreement for the person or firm to whom the contract is awarded or otherwise benefit, directly or indirectly, from the performance of the project for which the withdrawn proposal was submitted.

ERRORS IN PROPOSALS – When an error is made in extending total prices, the unit bid price will govern. Erasures in proposals must be initialed by the Offeror. Carelessness in quoting prices, or in preparation of proposal otherwise, will not relieve the Offeror. Offerors are cautioned to recheck their proposals for possible error. Errors discovered after opening cannot be corrected and the bidder will be required to perform if his or her bid is accepted.

IDENTIFICATION OF PROPOSAL ENVELOPE: The signed proposal and requested copies should be returned in a separate envelope or package, sealed and identified with the following information:

ADDRESSED AS INDICATED ON PAGE 1

RFP NUMBER
TITLE
PROPOSAL DUE DATE AND TIME
VENDOR NAME AND COMPLETE MAILING ADDRESS (RETURN ADDRESS)

If a proposal is not addressed with the information as shown above, the Offeror takes the risk that the envelope may be inadvertently opened and the information compromised, which may cause the proposal to be disqualified. Proposals may be hand delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

ACCEPTANCE OF PROPOSALS: Unless otherwise specified, all formal proposals submitted shall be valid for a minimum period of twenty (20) calendar days following the date established for acceptance. At the end of the twenty (20) calendar days the proposal may be withdrawn at the written request of the Offeror. If the proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is canceled.

CONDITIONAL BIDS: Conditional bids are subject to rejection in whole or in part.

BIDDERS PRESENT: At the time fixed for the opening of responses to a bid, bid contents will **not** be made public for the information of bidders and other interested parties who may be present either in person or by representative.

RESPONSE TO SOLICITATIONS: In the event a vendor cannot submit a bid on a solicitation, the vendor is requested to return the solicitation cover sheet with an explanation as to why the vendor is unable to bid on these requirements so that we may better understand our potential vendor pool.

TAX EXEMPTION: The Group is exempt from the payment of any federal excise tax. The price bid must be net, exclusive of federal taxes. Tax exemption certificates will be furnished if requested by the Offeror.

DEBARMENT STATUS: By submitting their proposals, Offerors certify that they are not currently debarred from submitting proposals on contracts by The Group, nor are they an agent of any person or entity that is currently debarred from submitting bids or proposals on contracts by The Group.

ETHICS IN CONTRACTING: By submitting their proposals, all Offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other Offeror, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any employee of The Group having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services, or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.

NO CONTACT POLICY: No Offeror shall initiate or otherwise have contact related to the solicitation with any Owner representative or employee, other than The Group, after the date and time established for receipt of proposals. Any contact initiated by an Offeror with any Owner representative, other than The Group, concerning this solicitation is prohibited and may cause the disqualification of the Offeror from this procurement process.

CONFLICT OF INTEREST: Contractor certifies by signing bid to The Group that no conflict of interest exists between Contractor and The Group that interferes with fair competition and no conflict of interest exists between Contractor and any other person or organization that constitutes a conflict of interest with respect to the contract with The Group.

6.2 Specifications

BRAND NAME OR EQUAL ITEMS: Unless otherwise provided in the solicitation, the name of a certain brand, make or manufacturer does not restrict bidders to the specific brand, make or manufacturer named; it conveys the general style, type, character, and quality of the article desired, and any article which The Group in its sole discretion determines to be the equal of that specified, considering quality, workmanship, economy of operation, and suitability for the purpose intended, shall be accepted. The Bidder is responsible to clearly and specifically indicate the product being offered and to provide sufficient descriptive literature, catalog cuts and technical detail to enable The Group to determine if the product offered meets the requirements of the solicitation. This is required even if offering the exact brand, make or manufacturer specified. Normally in competitive sealed bidding, only the information furnished with the bid will be considered in the evaluation. Failure to furnish adequate data for evaluation purposes may result in declaring a bid non-responsive. Unless the Bidder clearly indicates in its proposal that the product offered is "equal" product, such proposal will be considered to offer the brand name product referenced in the solicitation.

FORMAL SPECIFICATIONS: When a solicitation contains a specification which states no substitutes, no deviation therefrom will be permitted and the bidder will be required to furnish articles in conformity with that specification.

OMISSIONS & DISCREPANCIES: Any items or parts of any equipment listed in this solicitation which are not fully described or are omitted from such specification, and which are clearly necessary for the completion of such equipment and its appurtenances, shall be considered a part of such equipment although not directly specified or called for in the specifications.

The Offeror shall abide by and comply with the true intent of the specifications and not take advantage of any unintentional error or omission, but shall fully complete every part as the true intent and meaning of the specifications and drawings. Whenever the mention is made of any articles, material or workmanship to be in accordance with laws, ordinances, building codes, underwriter's codes, A.S.T.M. regulations or similar expressions, the requirements of these laws, ordinances., etc., shall be construed as to the minimum requirements of these specifications.

CONDITION OF ITEMS: Unless otherwise specified in the solicitation, all items shall be new, in first-class condition.

6.3 Award

AWARD OR REJECTION OF BIDS: The Purchasing Agent shall award the contract to the lowest responsive and responsible bidder complying with all provisions of the IFB, provided the bid price is reasonable and it is in the best interest of The Group to accept it. Awards made in response to a RFP will be made to the highest qualified offeror whose proposal is determined, in writing, to be the most advantageous to The Group taking into consideration the evaluation factors set forth in the RFP. The Purchasing Agent reserves the right to award a contract by individual items, in the aggregate, or in combination thereof, or to reject any or all proposals and to waive any informality in proposals received whenever such rejection or waiver is in the best interest of The Group. Award may be made to as many offerors as deemed necessary to fulfill the anticipated requirements of The Group. The Purchasing Agent also reserves the right to reject the bid if a bidder is deemed to be a non-responsible bidder.

ANNOUNCEMENT OF AWARD: Upon the award or announcement of the decision to award a contract as a result of this solicitation, The Group will inform all offerors whose proposals were properly submitted and duly identified with the results of their proposal.

QUALIFICATIONS OF BIDDERS OR OFFERORS: The Group may make such reasonable investigations as deemed proper and necessary to determine the ability of the Offeror to perform the work/furnish the item(s) and the Offeror shall furnish to The Group all such information and data for this purpose as may be requested. The Group reserves the right to inspect Bidder's/Offeror's physical facilities prior to award to satisfy questions regarding the Bidder's/Offeror's capabilities. The Group further reserves the right to reject any bid or proposal if the evidence submitted by or investigations of, such Offeror fails to satisfy The Group that such Offeror is properly qualified to carry out the obligations of the contract and to complete the work/furnish the item(s) contemplated therein.

6.4 Contract Provisions

APPLICABLE LAW AND COURTS: Any contract resulting from this solicitation shall be governed in any respects by the laws of Virginia, and any litigation with respect thereto shall be brought in the Circuit Court of Fairfax County, Virginia. The Contractor shall comply with applicable federal, state and local laws and regulations.

IMMIGRATION REFORM AND CONTROL ACT OF 1986: By submitting their bids, Bidders certify that they do not and will not during the performance of this contract employ illegal alien workers or otherwise violate the provisions of the federal Immigration Reform and Control Act of 1986.

ANTI TRUST: By entering into a contract, the Contractor conveys, sells, assigns, and transfers to The Group all rights, title and interest in and to all causes of the action it may now have or hereafter acquire under the antitrust law of the United States and Fairfax County, relating to the particular goods or services purchased or acquired by The Group under said contract. Consistent and continued tie bidding could cause rejection of bids by the Purchasing Agent and/or investigation for Anti Trust violations.

PAYMENT TERMS: Unless otherwise provided in the solicitation payment will be made forty-five (45) days after receipt of a proper invoice, or forty-five (45) days after receipt of all goods or acceptance of work, whichever is the latter.

Invoices for items/services ordered, delivered/performed and accepted shall be submitted by the Contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the contract number, purchase order number, and any federal employer identification number.

Any payment terms requiring payment in less than 45 days will be regarded as requiring payment 45 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 45 days, however.

The date of payment shall be deemed the date of postmark in all cases where payment is made by mail.

PAYMENT TO SUBCONTRACTORS: A contractor awarded a contract under this solicitation is hereby obligated:

- To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from The Group for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or
- To notify The Group and the subcontractor(s), in writing, of the contractor's intention to withhold payment and the reason.

ASSIGNMENT OF CONTRACT: A contract shall not be assignable by the Contractor in whole or in part without the written consent of the Purchasing Agent.

DEFAULT: In case of failure to deliver goods or services in accordance with the contract terms and conditions, The Group, after due oral or written notice, may procure those goods and services from other sources and hold the Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to other remedies which The Group may have.

ANTI DISCRIMINATION: By submitting their proposals, Offerors certify to The Group that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and Section 2.2-4311 of the Virginia Public Procurement Act. If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender or national origin.

During the performance of this contract, the Contractor agrees as follows:

- The Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification

reasonably necessary to the normal operation of the contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

- The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, will state that such Contractor is an equal opportunity employer.
- Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this Section.

INVOICES: Invoices for items ordered, delivered and accepted shall be submitted by the Contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the RFP number and/or purchase order number.

CHANGES TO THE CONTRACT: Changes can be made to the contract in any of the following ways:

- The parties may agree to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.
- The Group may order changes within the general scope of the contract at any time by written notice to the Contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed and the place of delivery or installation. The Contractor shall comply with the notice upon receipt. The Contractor shall be compensated for any additional costs incurred as the result of such order and shall give The Group a credit for any savings.

INDEMNIFICATION: Contractor shall indemnify, keep and save harmless The Group, its agents, officials, employees and volunteers against claims of injuries, death, damage to property, patent claims, suits, liabilities, judgments, cost and expenses which may otherwise accrue against The Group in consequence of the granting of a contract or which may otherwise result therefrom, if it shall be determined that the act was caused through negligence or error, or omission of the Contractor or his or her employees, or that of the subcontractor or his or her employees, if any; and the Contractor shall, at his or her own expense, appear, defend and pay all charges of attorneys and all costs and other expenses arising therefrom or incurred in connection therewith; and if any judgment shall be rendered against The Group in any such action, the Contractor shall, at his or her own expenses, satisfy and discharge the same. Contractor expressly understands and agrees that any performance bond or insurance protection required by this contract, or otherwise provided by the Contractor, shall in no way limit the responsibility to indemnify, keep and save harmless and defend The Group as herein provided.

TERMINATION: Subject to the provisions below, the contract may be terminated by The Group upon thirty (30) days advance written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

- Termination for Convenience: In the event that the contract is terminated upon request and for the convenience of The Group, without the required thirty (30) days advance notice, then The Group shall be responsible for payment of services up to the termination date.
- Termination for Cause: Termination by The Group for cause, default or negligence on the part of the contractor shall be excluded from the foregoing provision; termination costs, if any shall not apply. However, pursuant to these General Conditions, The Group may hold the contractor responsible for any resulting additional purchase and administrative costs. The thirty (30) days advance notice requirement is waived in the event of Termination for Cause.

6.5 Delivery Provision

RESPONSIBILITY FOR SUPPLIES TENDERED: The Contractor shall be responsible for the materials or supplies covered by the contract until they are delivered at the designated point, but the Contractor shall bear all risk on rejected materials or supplies after notice of rejection. Rejected materials or supplies must be removed by and at the expense of the contractor promptly after notification of rejection, unless public health and safety require immediate destruction or other disposal of rejected delivery. If rejected materials are not removed by the Contractor within ten (10) days after date of notification, The Group may return the rejected materials or supplies to the Contractor at his or her risk and expense or dispose of them as its own property.

INSPECTIONS: The Group reserves the right to conduct any test/inspection it may deem advisable to assure supplies and services conform to the specification. Inspection and acceptance of materials or supplies will be made after delivery at destinations herein specified unless otherwise stated. If inspection is made after delivery at destination herein specified, The Group will bear the expense of inspection except for the value of samples used in case of rejection. Final inspection shall be conclusive except in regard to latent defects, fraud or such gross mistakes as to amount to fraud. Final inspection and acceptance or rejection of the materials or supplies will be made as promptly as practicable, but failure to inspect and accept or reject materials or supplies shall not impose liability on The Group for such materials or supplies as are not in accordance with the specifications.

COMPLIANCE: Delivery must be made as ordered and in accordance with the solicitation or as directed by The Group when not in conflict with the bid/contract. The decision as to reasonable compliance with delivery terms shall be final. Burden of proof of delay in receipt of goods by the purchaser shall rest with the Contractor. Any request for extension of time of delivery from that specified must be approved by The Group, such extension applying only to the particular item or shipment affected. Should the Contractor be delayed by The Group, there shall be added to the time of completion a time equal to the period of such delay caused by The Group. However, the contractor shall not be entitled to claim damages of extra compensation for such delay or suspension. These conditions may vary for construction contracts.

REPLACEMENT: Materials or components that have been rejected by The Group, in accordance with the terms of the contract, shall be replaced by the Contractor at no cost to The Group.

6.6 Bidder/Contractor Remedies

DISPUTES: Contractual claims, whether for money or other relief, shall be submitted in writing to The Group thirty (30) days after final payment; however, written notice of the Contractor's intention to file such claim shall have been given at the time of the occurrence or beginning of the Work upon which the claim is based. Nothing herein shall preclude a contract from requiring submission of an invoice for final payment within a certain time after completion and acceptance of the work or acceptance of the goods. Pendency of claims shall not delay payment of amount agreed due in the final payment. A written decision upon any such claims will be made by The Group within sixty (60) days after submittal of the claim. The Contractor may not institute legal action prior to receipt of The Group's decision on the claim unless the applicable party fails to render such decision within sixty (60) days.

--- Nothing Follows ---