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**Request for Proposal  
for  
Marketing Project Management Software  
  
1503**

**Sealed Proposals will be received until  
October 10, 2014 at 10am**

PROPOSALS TO BE DELIVERED, MAILED TO:

Jessica Chavira, CTPM  
TEXAS STATE TECHNICAL COLLEGE  
300 Homer K. Taylor Drive  
Sweetwater, TX 79556

Email: [jessica.chavira@tstc.edu](mailto:jessica.chavira@tstc.edu)

***Show RFP Number, Opening Date, and Time on Return Envelope***

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## **SECTION 1**

### **GENERAL INFORMATION**

**1.1 Purpose of the Request for Proposals –**

Texas State Technical College is requesting proposals for marketing project management software for managing projects and collaborating with clients.

**1.2 Information about Texas State Technical College System --** TSTC is a state-supported, technical college system that services students throughout the state of Texas. The college system includes four colleges: TSTC Harlingen, TSTC Marshall, TSTC Waco, and TSTC West Texas, which has campuses in Abilene, Breckenridge, Brownwood, and Sweetwater.

**1.3 Historically Underutilized Business (HUB) Firms --** TSTC endeavors to promote full and equal opportunity for businesses to supply TSTC with goods and/or Services that are necessary to support TSTC's educational mission. In this regard, TSTC commits to select Proposers in accordance with (i) needs, (ii) resources, (iii) HUB goals and guidelines established by the Texas Legislature and the Texas Building and Procurement Commission, and (iv) policies and procedures for contracting with Historically Underutilized Businesses.

**1.4 TSTC's Right to Reject --** This RFP does not commit TSTC to select a Proposer or to award a Contract to any Proposer. TSTC reserves the right to accept or reject, in whole or in part, any Proposal it receives pursuant to this RFP.

**1.5 Intent to Respond**

**See Next Page**

## Texas State Technical College

Procurement Services Department  
300 Homer K. Taylor Drive  
Sweetwater, TX 79556

### Intent to Respond

**REQ No: 1503 Marketing Project Management Software at 10am**

To facilitate your firm's participation in TSTC's bid process, we ask that you fill in the requested information below as acknowledgment that you have received the bid noted above. By doing this, we will also be able to provide notification to you of any addenda to this solicitation. A 'No Bid' response on this form will not preclude receipt of future invitations unless you request removal from the CMBL list by so indicating below.

#### **Respondent**

**Vendor Name:** \_\_\_\_\_

**Contact Person:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**Address:** \_\_\_\_\_

☐ **Yes, our company does have an interest in responding.**

#### **We hereby submit a "No Bid" because:**

- ☐ 1. We are not interested in selling through the bid process.
- ☐ 2. We are unable to prepare the bid in time to meet the bid due date.
- ☐ 3. We do not wish to bid under the TSTC Terms and Conditions.

Objections: \_\_\_\_\_

- ☐ 4. We do not feel we can be competitive.

- ☐ 5. We cannot submit bid because of:

Objections: \_\_\_\_\_

- ☐ 6. We do not wish to sell to a state agency.

Objections: \_\_\_\_\_

- ☐ 7. We do not sell the item(s) as stated on the bid document.

- ☐ 8. Other: \_\_\_\_\_

#### **We wish to:**

- ☐ Remain on the CMBL list
- ☐ Be deleted from the CMBL list

#### **Please indicate if you are:**

- ☐ HUB ☐ Interested in becoming a HUB
- ☐ Non - HUB

TSTC Bids may be downloaded at:

<http://www.tstc.edu/westtexasabout/bids>

or

<http://esbd.cpa.state.tx.us/>

**Signed:** \_\_\_\_\_

## **SECTION 2**

### **Scope of Work**

#### **2.0 Scope of Work**

Texas State Technical College is requesting proposals for marketing project management software for managing projects and collaborating with clients

#### **2.1 Deliverables**

Marketing project management software must have the ability to do the following functions:

- a) Cataloging of project requests
- b) Assessment/approval of project requests (feasibility, risk, etc.)
- c) Project prioritization
- d) Project planning
- e) Tracking project documents (feasibility reports, statements of work, project plans, etc.)
- f) Maintaining a repository of project documents
- g) Capturing and reporting on project progress, issues and changes
- h) Providing high level multi-project/portfolio status reports and dashboards
- i) Post-implementation project audits
- j) Proving project performance reports/scorecards

Overall features:

- Flexible permissions for your team and clients
- Web based for easy access from any location with a browser: computer and any mobile device
- Every document, project, task, and request has its own comment area to discuss changes that are needed, meeting notes, and emails to stay informed and organized
- Custom branding
- Unlimited training and support

Document Manager

- Secure file sharing internally and externally
- Ability to markup images and PDFs
- Request approval on your workflow
- File versioning keeps track of multiple versions with version numbers

Project Tracker

- Project dashboard views provide visibility into what the group is working on
- Status alerts remind the team where things are at and if the project is being help up
- Project templates

- Gantt Chart availability
- Dependencies link tasks together
- Filters available
- Track time on specific tasks
- Track expenses

#### Project Requests

- Customize project request forms

#### Security/User Management

- Ability to provide controlled access and change privileges
- Ability to provide audit trail capability

#### Reports

- Generates status and summary reports

#### Calendar

- Calendar available
- Set reminders of upcoming meetings or deadlines
- Ability to sync with existing external calendar

#### Budget

Our proposed budget for this is \$16,000

**SECTION 3**  
**RFP REQUIREMENTS**

- 3.1 Right to Modify, Rescind, or Revoke RFP** -- TSTC reserves the rights to modify, rescind, or revoke this RFP, in whole or in part, at any time prior to the date on which the authorized representative of TSTC executes a Contract with the Selected Proposer.
- 3.2 Requirements for Submission** -- The proposal shall be entitled 1503 Marketing Project Management Software submitted for October 10, 2015 at 10am and shall clearly state the proposal Opening Date and Time identified.

The Proposal may be sent to TSTC at the following addresses:

**By U.S. Mail/ Overnight/Express**

TSTC  
Attn: Procurement Services  
1503 Marketing Project Management Software  
300 Homer K. Taylor Drive  
Sweetwater, Texas 79556

**By Hand Delivery**

TSTC  
1503 Marketing Project Management Software  
300 Homer K. Taylor Drive  
Sears Building – Procurement Division  
Sweetwater, Texas

- 3.3 Deadline for Proposals** -- **Proposals must be received in the TSTC Procurement Services Office, at the address specified in Section 3.2 of this RFP, no later than October 10, 2014 at 10am.**

**ANY PROPOSAL RECEIVED AFTER EXPIRATION OF  
THE DEADLINE WILL BE IMMEDIATELY  
DISQUALIFIED FROM CONSIDERATION, AND WILL BE  
RETURNED UNOPENED TO THE PROPOSER.**

- 3.4 Contents of Proposal**

Contents: Listed below is a summary of all information to be included in a Proposal submitted in response to this RFP.

(1) Respondent Information: Include the following information related to the responding business entity: formal name and all assumed names used by the business entity; structure of business entity (i.e. sole proprietorship, partnership, corporation, etc.); state in which business entity was formed or incorporated; physical address and mailing address; principal place of business; whether, and to what extent, Respondent has established a physical presence in the State of Texas including relevant timeframes; and name, title, address, telephone number, facsimile number, and e-mail address of Respondent's primary contact.

(2) The Respondent must provide evidence of financial responsibility and stability for performance of the requirements/services for which a proposal is submitted. In addition, the Respondent must disclose the source of any outside financial resources that will be utilized by the Respondent to enable it to perform any Contract awarded pursuant to the RFP. If requested by {insert agency name here} Respondent must provide copies of documents to show the financial capability to demonstrate financial solvency, and to verify the capacity to fulfill the requirements of this RFP. The documents may include but are not limited to the Respondent's most recent audited financial statement. {Insert agency name here} reserves the right to require any additional information necessary to determine the financial integrity and responsibility of a Respondent and to reject a response on the grounds of the Respondent's financial soundness.

(3) Exhibit A – Execution of Proposal: Failure to sign and return the Execution of Proposal with the submitted Proposal will result in rejection of the Proposal.

(4) Exhibit B – Cost: Provide the cost for the software; and support.

(5) Exhibit C: Proposed Products/Services: With respect to each of the services outlined in Section 2.1, provide the information requested below:

Experience and Proposals: Describe services your organization has provided in the past 5 years that demonstrates your organization's capability to carry out the proposed services. Include the nature of the services provided, scope of activities, and the organization for which the service was provided. Also, provide any experience in providing similar services to public entities. Include resumes for all personnel who will be responsible for the management and day-to-day operations of the products/services solicited in this RFP.

(6) Exhibit D: References: Include a minimum of three (3) references from clients for whom similar services were performed or products were provided. Include project description, contact names, position, and company name and telephone number for each reference listed.]



## **SECTION 4 EXECUTION OF OFFER**

Respondents shall carefully read the information contained in the following sections and submit a complete statement of Proposals that is responsive to all items in Section 2 and Section 3. Incomplete proposals will be considered non-responsive and subject to rejection.

### **4.1 NOTE TO RESPONDENTS: SUBMIT THIS ENTIRE SECTION 4 WITH RESPONSE.**

- 4.2 This Execution of Offer must be completed, signed, and returned with the Respondent's submittal. **Failure to complete, sign, and return this Execution of Offer may result in rejection of Respondent's submittal.**
- 4.3 Signing a false statement may void the submitted proposals or any agreements or other contractual agreements that may result from the submission of Respondent's Proposals. A false certification shall be deemed a material breach of contract and, at TSTC's option, may result in termination of any resulting contract.
- 4.4 By signature hereon, Respondent offers and agrees to furnish to TSTC the services described in this RFP and its Proposals, and to comply with all terms, conditions, and requirements set forth in the RFP documents.
- 4.5 By signature hereon, a corporate Respondent certifies that it is not currently delinquent in the payment of any franchise taxes due under Chapter 171, Texas Tax Code, or that the corporate Respondent is exempt from the payment of such taxes, or that the corporate Respondent is an out-of-state corporation that is not subject to the Texas franchise tax, whichever is applicable. Respondent agrees that each subcontractor under contract will also provide a certification of franchise tax status.
- 4.6 By signature hereon, Respondent hereby certifies that neither the Respondent nor the firm, corporation, partnership or owner represented by the Respondent, or anyone acting for such firm, corporation, or institution, has violated the antitrust laws of this state, codified in Section 15.01, et seq., Texas Business and Commerce Code, or the Federal antitrust laws, nor communicated directly or indirectly the Proposals to any competitor or any other person engaged in such line of business.
- 4.9 By signature hereon, Respondent represents and warrants that:
  - 4.9.1 Respondent is a reputable company regularly engaged in providing services necessary to meet the terms, conditions and requirements of the RFP;
  - 4.9.2 Respondent has the necessary experience, knowledge, abilities, skills, and resources to satisfactorily perform the terms, conditions and requirements of the RFP;
  - 4.9.3 Respondent is aware of, is fully informed about, and is in full compliance with all applicable federal, state and local laws, rules, regulations and ordinances;
  - 4.9.4 Respondent understands (i) the requirements and specifications set forth in this RFP and (ii) the terms and conditions set forth in the contract under which Respondent will be required to operate;
  - 4.9.5 Respondent, if selected by Owner, will maintain insurance as required by the Agreement for Master Planning Services;

- 4.9.6 All statements, information and representations prepared and submitted in responses to this RFP are current, complete, true and accurate. Respondent acknowledges that Owner will rely on such statements, information and representations in selecting the successful Respondent. If selected by Owner as the successful respondent, Respondent will notify Owner immediately of any material change in any matters with regard to which Respondent has made a statement or representation or provided information.
- 4.10 By signature hereon, Respondent certifies that the individual signing this document and the documents made part of the RFP is authorized to sign such documents on behalf of the company and to bind the company under any agreements or other contractual arrangements that may result from the submission of Respondent's Proposals.
- 4.11 By signature hereon, Respondent certifies that if a Texas address is shown as the address of the Respondent, Respondent qualifies as a Texas Resident Respondent as defined in 1 Texas Administrative Code § 111.2.
- 4.12 By signature hereon, Respondent certifies as follows:
- 4.12.1 "Under Section 231.006, Texas Family Code, the vendor or applicant certifies that the individual or business entity named in this contract, bid, or application is not ineligible to receive the specified grant, loan, or payment and acknowledges that the contract may be terminated and payment may be withheld if this certification is inaccurate."
- 4.12.2 "Under Section 2155.004, Texas Government Code, the vendor or applicant certifies that the individual or business entity named in this bid or contract is not ineligible to receive the specified contract and acknowledges that this bid or contract may be terminated and payment withheld if this certification is inaccurate."
- 4.12.3 "Under Section 2254.004, Texas Government Code, the vendor or applicant certifies that each individual or business entity that is an engineer or architect proposed by Respondent as a member of its team was selected based on demonstrated competence and proposals only."
- 4.13 By signature hereon, Respondent agrees to defend, indemnify, and hold harmless the State of Texas, all of its officers, agents and employees from and against all claims, actions, suits, demands, proceedings, costs, damages, and liabilities arising out of, connected with, or resulting from any acts or omissions of Respondent or any agent, employee, subcontractor, or supplier of Respondent in the execution or performance of any agreements or other contractual arrangements that may result from the submission of Respondent's Proposals.
- 4.14 By signature hereon, Respondent agrees that any payments that may become due under any agreements or other contractual arrangements that may result from the submission of Respondent's Proposals will be applied toward any debt, including, but not limited to, delinquent taxes and child support that is owed to the State of Texas. Further, under Section 231.006, Texas Family Code, Respondent certifies that the individual or business entity named in the contract, bid, or application is not ineligible to receive the specified grant, loan, or payment and acknowledges that the contract may be terminated and payment may be withheld if this certification is inaccurate

**Execution of Offer: 1503**

**The Respondent must complete, sign and return this Execution of Offer as part of its submittal response. The Respondent's company official(s) who are authorized to commit to such a submittal must sign the submittal. Failure to sign and return this form may result in rejection of Respondent's submittal.**

Respondent's Name: \_\_\_\_\_

Respondent's State of Texas Tax Account No: \_\_\_\_\_

If a Corporation:

Respondent's State of Incorporation: \_\_\_\_\_

Respondent's Charter No: \_\_\_\_\_

**Submitted and Certified by:**

\_\_\_\_\_  
Signatory's Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

## **SECTION 5**

### **RFP Procedures**

- 5.1 Rescission of Proposal** -- Proposals can be withdrawn from consideration at any time prior to expiration of the Deadline for proposals, as stated in Section 3.3 of this RFP, pursuant to a written request sent to the Director of Contracting.
- 5.2 Request for Electronic Copy** -- A Proposer may request an electronic copy of the RFP from the Director of Purchasing. Electronic copies will be forwarded through email addresses only.
- 5.3 Request for Clarification** -- TSTC reserves the right to request clarification of any information contained in a Proposal.
- 5.4 Request for Clarification by Proposer** -- All questions and clarifications of the Proposals contact the following  
Procurement Services Contact:  
Jessica Chavira at  
325-235-7342 or [jessica.chavira@tstc.edu](mailto:jessica.chavira@tstc.edu)
- 5.5 Evaluation of Proposals**  
TSTC will evaluate the submissions based upon the following:
- |                            |           |
|----------------------------|-----------|
| • Functional Requirements  | 40 points |
| • Experience & Reliability | 35 points |
| • Within Budget            | 25 points |
- 5.6 Proposal Opening**
- Proposals will be opened after the deadline at the Texas State Technical College, October 10, 2014 at 10am. The Proposal opening process is open to the public. All submitted Proposals become the property of TSTC, after the RFP submittal deadline/opening date, and will not be returned.
- All information, documentation, and other materials submitted in response to this solicitation are considered and/or non-proprietary and are subject to public disclosure under the Texas Public Information Act (Texas Government Code, Chapter 552.001, et seq.) after the solicitation is completed.
- 5.7 Form of Contract**
- Any contract resulting from this solicitation will be in the form of the Agreement.

**Section 6**  
**Tentative Schedule**

10/03/2014	Post RFP on the Electronic State Business Daily
10/10/2014	Submittal of Proposal due on or before 10:00 am CST
10/14/2014	Final Selection
10/14/2014	Complete negotiations, issue contract, and commence work