



REQUEST FOR PROPOSAL – FY 2023-24
#RFP-ELCD-CRM-23-24
Customer Relationship Management
Platform

The Early Learning Coalition of Duval (the "Coalition"), a Florida not-for-profit corporation is seeking a Customer Relationship Management Platform (CRM). In order to select a vendor to deliver these services, the Coalition requests a proposal for services based on the specifications listed below.

Upon receipt of all the proposals, the Coalition will review and make a decision based on experience, technical abilities, cost and other factors which would be appropriate for a review of quote for a Customer Relationship Management Platform (CRM).

Evaluation Criteria:

- Experience – 60 points
- Cost – 15 points
- Technical abilities – 15 points
- Proposal Presentation – 10 points

The selected vendor will be required to enter into an agreement with the Coalition for the services listed below:

The Coalition is seeking to consolidate all current local Coalition tracking, monitoring and data management systems into a single Customer Relationship Management Platform (CRM). The CRM must meet the needs of the Coalition and would need to encompass the ability to adapt to changes in state or local requirements. All proposals must also include, but not be limited to, training for Coalition staff, administrative rights to the database, multiple user roles, access for concurrent users, robust reporting capabilities, data backup for redundancy, project management for implementation of the database system, testing to ensure correct functionality of the system, and ongoing support and technical assistance.

It is very important that the vendor is able to provide a simple management console that would allow the Coalition to manage and modify the console with minimal input from vendor as well as incorporate dashboarding reports and workflow capabilities.



Contract Period: The contract is for 3 years with renewal options for an additional 3 years.

The complete bid, as well as more information about the organization can be found on our web site www.elcduval.org

ALL QUESTIONS MUST BE SENT IN WRITING VIA EMAIL.

Early Learning Coalition of Duval
Jim Ungaro, Director of Finance
jungaro@elcduval.org

RESPONSE FORMAT

All responses to request for proposals must be in writing and should be sent via email and as hard copies (one original and two copies) to:

Early Learning Coalition of Duval
Jim Ungaro, Director of Finance
6500 Bowden Road; Suite 290
Jacksonville, FL 32216
jungaro@elcduval.org

- I. Company Name
- II. Contact Person
 - A. Name
 - B. Title
 - C. Address
 - D. Telephone, Fax, E-Mail
- III. Company Incorporation date and taxpayer identification number
- IV. Prior Relevant Experience
- V. General plan for provision of services
- VI. Estimated cost for provision of services
- VII. All requested attachments



APPLICATION TIMETABLE / IMPORTANT DATES

ACTIVITY	DATE	TIME	ADDRESS
Request for Proposals Advertised	No later than Sep. 21, 2023	N/A	Notice of RFP posted on the ELC of Duval website, one local newspaper, and Florida Administrative Weekly.
Last Day to Submit all questions to the Coalition	No later than Oct. 5, 2023	5:00 PM	Early Learning Coalition of Duval Attn: Jim Ungaro, Director of Finance jungaro@elcduval.org
Sealed Applications must be received	Oct. 19, 2023	5:00 PM	Early Learning Coalition of Duval Attn: Jim Ungaro, Director of Finance 6500 Bowden Road; Suite 290 Jacksonville, FL 32216
Meeting of the Evaluation Committee	Week of Oct. 23-27, 2023	N/A	
Top-Ranked Proposers Demonstration either on-site or remote.	Week of Oct. 30-Nov. 3, 2023	TBA	
Final Evaluation and Contract Award Communication	Week of Nov. 4 - 8, 2023	N/A	Contract Award Communication via email
Effective Date of Contract	Nov. 15, 2023	N/A	N/A

- *These dates subject to change based on the need of additional information or evaluation.*



ADMINISTRATIVE PROCEDURES

PROPOSAL SUBMISSION

For the purpose of this proposal the terms respondent, applicant, proposer, vendor and contractor are used interchangeably and mean a person(s) or organization(s) submitting a response to this solicitation.

Where to Submit the Proposal

Hard copy responses to this Request for Proposals must be submitted in a sealed envelope to:
Jim Ungaro, Director of Finance
Early Learning Coalition of Duval, Inc.
6500 Bowden Road, Suite 290
Jacksonville, FL 32216

Please mark on your mailing envelope containing your response in LARGE LETTERS:

SEALED RESPONSE – DO NOT OPEN RFP-ELCD-CRM-23-24

Email responses are sent to jungaro@elcduval.org

The Coalition reserves the right to request a best and final offer from any Proposer to incorporate changes which will support a better understanding of the regulations, or which any regulatory changes may require.

The Coalition reserves the right to make any and all determinations exclusively which it deems are necessary to protect the best interests of its early learning program and the families who are served by the Coalition either directly or through anyone of its Contractors. The absence of the Coalition setting forth a specific reservation of rights does not subject other areas of the Contract resulting from this RFP to mutual agreement.

Invoicing and payment of invoices

The contract resulting from this RFP will be a **cost reimbursement contract**. The Coalition will accept the successful Applicant's invoice upon review of that invoice for completeness. Applicants are required to submit a blank invoice with the response to the RFP. During contract negotiations, the Coalition staff will provide vendor(s) with list of services to be displayed on invoices and documentation on completed services with reports.

Assurances and Certifications

Proposer must sign and submit all attached Assurances and Certifications.

Acceptance/Rejection of Proposals and Waiver of Minor Irregularities

Proposals not received at either the specified place, or by the specified date and time, or both, will be rejected and returned unopened to the prospective Applicant by the Coalition. The coalition will retain one unopened copy for use in the event of a dispute.



The Coalition reserves the right to reject any and all proposals or to waive minor irregularities when to do so would be in the best interest of the Coalition. Minor irregularity is defined as a variation from the Request For Proposal terms and conditions which does not affect the price of the proposal, or give the prospective Applicant an advantage or benefit not enjoyed by other prospective Applicants, or does not

adversely impact the interest of the Coalition. At its option, the coalition may correct minor irregularities but is under no obligation to do so whatsoever.

All proposals submitted timely and correctly that are responsive will be accepted by the Coalition. The Coalition reserves the right, however, to reject any or all proposals received, or cancel this RFP, based on the best interests of the State of Florida. The Coalition reserves the right to make a final selection without further discussion of the responses submitted.

A non-responsive proposal shall include, but not be limited to, those that:

- i) are irregular or are not in conformance with the requirements and instructions contained herein;
- ii) have improper or undated signatures;
- iii) fail to utilize or complete prescribed forms;
- iv) are conditional proposals;
- v) are incomplete proposals;
- vi) are not received on or before the closing deadline;
- vii) propose a set of services which cannot be completed within the contract period / will require additional funding to implement.

THE RESPONSIVENESS OF A PROPOSAL SHALL BE DETERMINED BASED UPON THE DOCUMENTS SUBMITTED WITH THE PROPOSAL. A NON-RESPONSIVE PROPOSAL WILL NOT BE CONSIDERED.

The Coalition may waive minor irregularities in the proposals received where such are merely a matter of form and not substance, and the corrections of such ARE NOT PREJUDICIAL to other respondents.

Variations which are *not minor* **will not** be waived.



REQUIRED ATTACHMENTS

ATTACHMENT 1

STATEMENT OF INSURANCE COVERAGE

ATTACHMENT 2

- A. Debarment and Suspension Certification (29 CFR Part 95 and 45 CFR Part 74)**
- B. Certification Regarding Lobbying (29 CFR Part 93 and 45 CFR Part 93)**
- C. Drug free Workplace Certification (29 CFR Part 98 and 45 CFR Part 82)**
- D. Nondiscrimination & Equal Opportunity Assurance (29 CFR Part 37 and 45 CFR Part 80)**
- E. Certification Regarding Public Entity Crimes, section 287.133, F.S.**
- F. Conflict of Interest**
- G. Public Records**
- H. Terms & Conditions**

A. CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS – PRIMARY COVERED TRANSACTION.

The undersigned Contractor certifies to the best of its knowledge and belief, that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by a Federal department or agency; verification through <https://www.sam.gov/>
2. Have not within a three-year period preceding this Agreement been convicted or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted or otherwise criminally or civilly charged by a government entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph A.2. of this certification; and/or
4. Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State, or local) terminated for cause of default.
5. Where the Contractor is unable to certify to any of the statements in this certification, such Contractor shall attach an explanation to this Agreement.

B. CERTIFICATION REGARDING LOBBYING – Certification for Contracts, Grants, Loans, and Cooperative Agreements. The undersigned Contractor certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal contract, grant, loan or cooperative agreement.

2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employees of Congress, or employee of a Member of Congress in connection with a Federal contract, grant, loan, or cooperative agreement, the undersigned shall also complete and submit Standard Form – LLL, “Disclosure Form to Report Lobbying,” in accordance with its instructions.
3. The undersigned shall require that language of this certification be included in the documents for all subcontracts at all tiers (including subcontracts, sub-grants and contracts under grants, loans and cooperative agreements) and that all sub-recipients and contractors shall certify and disclose accordingly.
4. This certification is a material representation of fact upon which reliance was placed when this Agreement was made or entered into. Submission of this certification is a prerequisite for making or entering into this Agreement imposed by 31 U.S.C. 1352. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

C. CERTIFICATION REGARDING DRUG-FREE WORKPLACE REQUIREMENTS.

Pursuant to the Drug-Free Workplace Act of 1988 and its implementing regulations codified at 29 C.F.R. 98, Subpart F. I, the undersigned Contractor, attest and certify that the Contractor will provide a drug-free workplace by the following actions.

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the Contractor’s workplace and specifying the actions that will be taken against employees for violation of such prohibition.
2. Establishing an ongoing drug-free awareness program to inform employees concerning:
 - a. The dangers of drug abuse in the workplace.
 - b. The policy of maintaining a drug-free workplace.
 - c. Any available drug counseling, rehabilitation and employee assistance programs.
 - d. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.
3. Making it a requirement that each employee to be engaged in the performance of the resulting contract be given a copy of the statement required by paragraph C.1 of this certification.
4. Notifying the employee in the statement required by paragraph C.1 of this certification that, as a condition of employment under the contract, the employee will:
 - a. Abide by the terms of the statement.
 - b. Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five (5) calendar days after such conviction.
5. Notifying the Coalition in writing ten (10) calendar days after receiving notice under subparagraph 4.b. from an employee or otherwise receiving actual notice of such conviction. Provide such notice of convicted employees, including position title, to every Contract officer on whose Contract activity the convicted employee was working. The notice shall include the identification number(s) of each affected Contract.
6. Taking one of the following actions, within thirty (30) calendar days of receiving notice under subparagraph 4.b., with respect to any employee who is so convicted.
 - a. Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973 as amended.
 - b. Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State or local, health, law

enforcement, or other appropriate agency.

7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of this entire certification.

The workplace could be a child care center, a family child care home, a training facility or the Coalition offices.

D. NON DISCRIMINATION & EQUAL OPPORTUNITY (29 C.F.R. PART 37 AND 45 C.F.R. PART 80).

As a condition of the Agreement, the Contractor assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

1. Section 188 of the Workforce Investment Act of 1998 (WIA), (Pub. L. 105-220), which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I-financially assisted program or activity;
2. Title VI of the Civil Rights Act of 1964 (Pub. L. 88-352), as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45, C.F.R. Part 80), to the end that, in accordance with Title VI of that Act and the Regulation, no person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the Applicant receives Federal financial assistance from the Department.
3. Section 504 of the Rehabilitation Act of 1973 (Pub. L. 93-112) as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F.R. Part 84), to the end that, in accordance with Section 504 of that Act, and the Regulation, no otherwise qualified handicapped individual in the United States shall, solely by reason of his handicap, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity for which the Applicant receives Federal financial assistance from the Department.
4. The Age Discrimination Act of 1975 (Pub. L. 94-135), as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F.R. Part 91), to the end that, in accordance with the Act and the Regulation, no person in the United States shall, on the basis of age, be denied the benefits of, be excluded from participation in, or be subjected to discrimination under any program or activity for which the Applicant receives Federal financial assistance from the Department.
5. Title IX of the Educational Amendments of 1972 (Pub. L. 92-318), as amended, and all requirements imposed by or pursuant to the Regulation of the Department of Health and Human Services (45 C.F. R. Part 86), to the end that, in accordance with Title IX and the Regulation, no person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any education program or activity for which the Applicant receives Federal financial assistance from the Department.
6. The American with Disabilities Act of 1990 (Pub. L. 101-336), prohibits discrimination in all employment practices, including, job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities, and;
7. The Contractor also assures that it will comply with 29 C.F.R. part 37 and all other regulations implementing the laws listed above. This assurance applies to the Contractor's operation of the WIA Title I – financially assisted program or activity, and to all agreements the Contractor makes to carry out the WIA Title I – financially assisted program or activity. The Contractor understands that the AWI and the United States has the right to seek judicial enforcement of the assurance.

E. CERTIFICATION REGARDING PUBLIC ENTITY CRIMES, SECTION 287.133, F.S.

The Contractor hereby certifies, through the duly appointed undersigned representative, that neither it, nor any person or affiliate of the Contractor, has been convicted of a Public Entity Crime as defined in section 287.133, Florida Statutes, nor placed on the convicted vendor list, suspended vendor list, or discriminatory vendor list all of which are located at http://dms.myflorida.com/business_operations/state_purchasing/vendor_information/convicted_suspended_discriminatory_complaints_vendor_lists/convicted_vendor_list.

The Contractor understands and agrees that it is required to inform the Coalition immediately upon any change of circumstances regarding this status.

F. CONFLICT OF INTEREST

The Contractor represents that the execution of this Contract does not violate the Coalition’s Conflict of Interest and State of Florida Code of Ethics, Section 112.311, F.S. The Contractor agrees to abide by and be governed by these conflict of interest laws throughout the course of this Contract and in connection with its obligations hereunder.

G. PUBLIC RECORDS

To the extent required by the Florida Public Records Act, Chapter 119, F.S., Vendor shall maintain and allow access to public records made or received in conjunction with this contract.

H. TERMS & CONDITIONS

Additional terms and conditions can be located on our website: http://elcduval.org/wp-content/uploads/2022/05/terms_conditions.pdf

By signing below, the Contractor certifies the representations outlined in parts A through H above are true and correct.

Contractor Acknowledgement:

Name of Business/Contractor: _____

Signature: _____

Print Name: _____

Title: _____
