



DEPARTMENT OF GENERAL SERVICES

PAUL N. PROTO  
DIRECTOR

COMMONWEALTH OF VIRGINIA  
**COUNTY OF HENRICO**

**RFP#08-8339-2CS**

**February 22, 2008**

**REQUEST FOR PROPOSAL  
CITIZEN/CUSTOMER RELATIONSHIP MANAGEMENT (CRM) INITIATIVES  
CONSULTING SERVICES**

Your firm is invited to submit a proposal to provide consulting services necessary for the formulation and deployment of Citizen/Customer Relationship Management (CRM) initiatives for the County of Henrico, Virginia in accordance with the enclosed specifications. The submittal, consisting of the original proposal and seven (7) additional copies marked, "**A PROPOSAL FOR CRM CONSULTING SERVICES**" will be received no later than **2:00 p.m., March 21, 2008**, by:

**IN PERSON OR SPECIAL COURIER**

County of Henrico  
Department of General Services  
Purchasing Office  
1590 E. Parham Road  
Richmond, Virginia 23228

OR

**U.S. POSTAL SERVICE**

County of Henrico  
Department of General Services  
P.O. Box 27032  
Richmond, Virginia 23273-7032

**This RFP and any addenda are available on the County of Henrico website at: [www.co.henrico.va.us](http://www.co.henrico.va.us)** The Bids and Proposals link is listed under the Henrico Business Section on the home page. To download the IFB, click the link and save the document to your hard drive. To receive a printed copy of this document please call (804) 501-5660 or [bla04@co.henrico.va.us](mailto:bla04@co.henrico.va.us) To receive an email copy of this document or any technical assistance please contact [edw@co.henrico.va.us](mailto:edw@co.henrico.va.us)

Time is of the essence and any proposal received after **2:00 p.m., March 21, 2008**, whether by mail or otherwise, will be returned unopened. The time of receipt shall be determined by the time clock stamp in the Purchasing Office, Department of General Services. Proposals shall be placed in a sealed, opaque envelope, marked in the lower left-hand corner with the RFP number, title, and date and hour proposals are scheduled to be received. Offerors are responsible for insuring that their proposal is stamped by Purchasing Office personnel by the deadline indicated.

**A pre-proposal conference will be held on March 4, 2008 at 10:00 a.m. in the Purchasing Office, North Run Office Complex, 1590 East Parham Road, Richmond, VA. Offerors are strongly encouraged to attend the pre-proposal conference in order to ask questions regarding RFP requirements. A teleconference number has been established for suppliers that are unable to travel to the County of Henrico. To join the meeting, call (804) 501-7555 and enter meeting id 7002. Limit one caller from each supplier.**

Nothing herein is intended to exclude any responsible firm or in any way restrain or restrict competition. On the contrary, all responsible firms are encouraged to submit proposals. The County of Henrico reserves the right to accept or reject any or all proposals submitted

Very truly yours,

Paul N. Proto  
Director of General Services

Cecelia H. Stowe, CPPO, C.P.M.  
Purchasing Manager  
[Sto05@co.henrico.va.us](mailto:Sto05@co.henrico.va.us)  
804-501-5685

**I. PURPOSE:**

The intent and purpose of this Request for Proposal (RFP), and the resulting contract, is to obtain the services of a qualified firm to provide consulting services necessary for the formulation and deployment of a comprehensive Countywide CRM initiative. Henrico's vision is to respond to its customers through seamless access to information and services. The County is seeking to develop a business process to establish and define performance benchmarks that will be used to evaluate and improve the delivery of services. Henrico believes that it can best achieve this vision through the deployment of CRM initiatives.

**II. BACKGROUND:**

The County Manager appointed a Steering Committee for purposes of exploring whether Henrico should pursue a CRM project. This ten member Steering Committee represents the major functional areas of County departments and for the past year has been actively educating itself with regard to CRM capabilities, and reviewing what systems are in place in some of our sister jurisdictions across the country. The Steering Committee has collected some data from County departments as to most frequently asked questions from their respective customers.

The County of Henrico is a mixed urban, suburban, and rural jurisdiction, with the West End of the County being urban and transitioning to suburban and rural traveling from West to East. Geographically, Henrico borders the City of Richmond on the West, North, and East. The County has a current population of approximately 300,000 and a current employee complement (not including the school system) of approximately 4,300 employees. It provides all services typically provided by an urban jurisdiction, and is one of two Counties in Virginia which constructs, owns, and maintains its own road system. It also operates an Enhanced 911 system, with one communications center serving the call taker and dispatch functions for Police, Fire, and Rescue calls for service.

The County operates under the County Manager form of Government, with a five member legislative body (Board of Supervisors) appointing the County Manager. The County Manager in turn appoints the department heads and key officials. Services to customers (both internal and external customers) are delivered by some 36 departments.

It is envisioned that all 36 departments will be initially exposed to the CRM project. The Contractor will work with the County to evaluate the launch alternatives including a soft launch whereby the initial deployment will be limited to a select number of departments – perhaps 3 to 5 departments. The successful Offeror will assist the County in determining which departments will be included in the initial roll out and subsequent phases of the CRM initiatives. It is envisioned that the CRM initiatives will include multiple elements, including but not necessarily limited to: a 311 call center; a Web based portal; work order/asset management systems; etc.

### III. SCOPE OF SERVICES:

The successful Offeror shall perform the following tasks under the contract awarded pursuant to this RFP:

- A. Project Management** – Provide management services throughout the process of planning for, soliciting, awarding, and accepting various elements of CRM, including but not necessarily limited to: a 311 call center and associated facilities; an automated work order system and a single web portal. The project management approach should address each of the five major project management processes: project initiation; project planning; project execution; project control; project closeout; and transition to County staff. The project manager will communicate with the County's CRM Steering Committee regarding: project status and issues; provide regular progress reports; ensure project deadlines are met; administer the project; attend County meetings as necessary; and manage the performance of contractual staff on the project.
- B. CRM Steering Committee Roles and Responsibilities Workshop** – Conduct a half-day workshop with the County's CRM Steering Committee. The purpose of the meeting is to introduce the Committee to the project methods and refine the project scope and objectives so that there is alignment among the key stakeholders. The roles and responsibilities for all project Committee members will be defined, the project communications plan reviewed and the project's critical success factors, obstacles and constraints identified.
- C. Initial Project Kick Off Meeting** – Conduct a CRM Workshop for representatives from each of the 36 county departments with the intent of exposing each department to the concepts and advantages of CRM initiatives. Although many departments will not be included in the first wave of deployment, this exposure and orientation to the project will provide each department with familiarity of the goals and objectives of the CRM in Henrico.
- D. Interview Stakeholders** – Conduct a sessions with key departments. Meet with and interview key staff within recommended impact departments in order to understand their current processes, technology, and organizational structure; assess the gap between the current environment and ability to move to a 311 solution. Survey constituents to evaluate how the County is currently serving them and how they want to be served.
- E. Identification of Requirements** – Create a high-level plan which will identify the requirements that will be included in an RFP for a CRM solution incorporating the principles that lead to a successful CRM implementation.
- F. Recommend Hardware/Software & Architectures** – Define a proposed architecture for the overall CRM solutions; the proposed architecture will focus on the 311 call center, CRM software, and the integration with existing systems.

**G. Implementation and Deployment Plan** – Evaluate system solution alternatives for a single CRM web portal solution to address the County’s CRM needs. Develop a report addressing the deployment of the 311 call center and associated CRM elements; the report will contain an implementation plan that will include activities, costs, schedules and resource requirements, as well as recommendations for the overall operation of a 311 call center. The successful Offeror will:

1. Review the current telephony deployment and identify additional capability required to support a 311 call center.
2. Participate in meetings with the telephony vendor to provide information regarding needed capabilities.
3. Document the additional hardware and software required as well as the cost of the additional items and services.
4. Validate the information with Information Technology staff and collaborate on a project plan detailing costs, project dependencies and timeframes.
5. Conduct a current environment workshop with Information Technology staff.
6. Review the current application environment, conduct a requirements workshop with Information Technology staff and build an integration matrix. The integration matrix will identify the current applications, integration criticality, integration complexity, integration cost and integration value. The completed matrix will be presented to the CRM Steering Committee for application inclusion. Then the successful Offeror will facilitate discussion and make recommendations.
7. Further identify costs and document the integration plans.

**H. Develop Cost Estimates** – Develop proposed budgets for the acquisition, acceptance, deployment, and operation of CRM elements, including but not limited to: hardware; software; staffing; and operational costs.

**I. Assist with Education of Legislative Participants** – Assist with briefing sessions for members of the Board of Supervisors as to the CRM solutions proposed to be acquired and implemented.

**J. Develop an RFP for the Acquisition and Deployment of CRM Solutions** – Draft an RFP which will specify the requirements as identified during the previous phases; the RFP will contain necessary specifications for the acquisition and acceptance of CRM (including 311 call center) hardware and software elements, as well as evaluation criteria to be used for the selection of the successful vendor(s). Identify software providers with proven public sector experience for RFP distribution.

**K. Integrated Automated Work Order System** – Assess the current state of technology within the County, and its capacity to support the implementation of a CRM system.

**L. Assist the County with the RFP Process** – Assist with the solicitation, evaluation, and selection of vendors for CRM including but not limited to 311 call center solutions, an integrated work order system and a single vision web portal.

**M. Acceptance of the Systems** – Assist the County with the system acceptance procedures.

**N. Change Management** – Meet with County staff to identify risks associated with the CRM and 311 Call Center program and develop a communications plan; work with departmental representatives to guide staff through the business environmental changes.

**IV. ANTICIPATED SCHEDULE:**

The following represents a tentative outline of the schedule currently anticipated by the County:

- |  |                           |
|--|---------------------------|
| ○ Request for Proposals distributed        | February 22, 2008         |
| ○ Pre-proposal conference                  | March 4, 2008, 10:00 a.m. |
| ○ Receive written proposals                | March 21, 2008, 2:00 p.m. |
| ○ Conduct oral interviews with Offerors on | April 16, 2008            |
| ○ Negotiations                             | April 23, 2008            |
| ○ Award of Contract                        | May 13, 2008              |

**V. COUNTY RESPONSIBILITIES:**

Henrico County will designate an individual to act as the Project Manager for all work performed under this contract.

**VI. GENERAL CONTRACT TERMS AND CONDITIONS:**

**A. Annual Appropriations:**

It is understood and agreed that this contract shall be subject to annual appropriations by the County of Henrico, Board of Supervisors. Should the Board fail to appropriate funds for this contract, the contract shall be terminated when existing funds are exhausted. There shall be no penalty should the Board fail to make annual appropriations for this contract.

**B. Award of the Contract:**

1. The County reserves the right to reject any or all proposals and to waive any informalities.
2. The Successful Offeror shall, within fifteen (15) calendar days after prescribed documents are presented for signature, execute and deliver to the Purchasing Office the contract forms and any other forms or bonds required by the RFP.
3. Any contract resulting from this RFP is not assignable.
4. Upon making an award, or giving notice of intent to award, the County will place appropriate notice on the public bulletin board located at the following locations:

Purchasing Office  
North Run Office Complex  
1590 East Parham Road

Eastern Government Center  
3820 Nine Mile Road  
Richmond, VA

Henrico Government Center  
4301 E. Parham Road  
Richmond, VA

Notice of award or intent to award may also appear on the Purchasing Office website: <http://www.co.henrico.va.us/genserv>

**C. Collusion:**

By submitting a proposal in response to this Request for Proposal, the Offeror represents that in the preparation and submission of this proposal, said Offeror did not, either directly or indirectly, enter into any combination or arrangement with any person, Offeror or corporation or enter into any agreement, participate in any collusion, or otherwise take any action in the restraint of free, competitive bidding in violation of the Sherman Act (15 U.S.C. Section 1) or Section 59.1-9.1 through 59.1-9.17 or Sections 59.1-68.6 through 59.1-68.8 of the Code of Virginia.

**D. Compensation:**

The Offeror shall be required to submit a complete itemized invoice on each delivery or service performed under the contract. Payment shall be rendered to the Successful Offeror for satisfactory compliance with the contract within forty-five (45) days after the receipt of the proper invoice.

**E. Controlling Law; Venue:**

This contract is made, entered into, and shall be performed in the County of Henrico, Virginia, and shall be governed by the applicable laws of the Commonwealth of Virginia. Any dispute arising out of the contract resulting from this RFP, its interpretations, or its performance shall be litigated only in the Henrico County General District Court or the Circuit Court of the County of Henrico, Virginia.

**F. Discussion of Exceptions to the RFP:**

The RFP, including its venue, termination, and payment schedule provisions, shall be incorporated by reference into the contract documents as if its provisions were stated verbatim therein. Therefore, any exception to any provisions of the RFP shall be explicitly identified in a separate "Exceptions to RFP" section of the proposal for resolution before execution of the contract. In case of any conflict between the RFP and any other contract documents, the RFP shall control unless the contract documents explicitly provide otherwise.

Please identify with proposal submission any "Exceptions to RFP"

**G. Drug-Free Workplace to be Maintained by the Contractor** (Code of Virginia, Section 2.2-4312)

1. During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
2. For the purposes of this section, "*drug-free workplace*" means a site for the performance of work done in connection with a specific contract awarded to a contractor in accordance with the Virginia Public Procurement Act, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

**H. Employment Discrimination by Contractor Prohibited:**

1. During the performance of this contract, the contractor agrees as follows (Code of Virginia, Section 2.2-4):
  - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or 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.
  - b. 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.
  - c. 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.
2. The contractor will include the provisions of the foregoing paragraphs a, b and c in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

**I. Indemnification:**

The successful Offeror agrees to indemnify, defend and hold harmless the County of Henrico including Henrico Public County Schools, its officers, agents and employees from any claims, damages, suits, actions, liabilities and costs of any kind or nature, including attorneys' fees, arising from or caused by the provision of any services, the failure to provide any services or the use of any services or materials furnished (or made available) by the successful Offeror, provided that such liability is not attributable to the County's sole negligence.

**J. Insurance Requirements:**

The Successful Offeror shall maintain insurance to protect itself and the County of Henrico from claims under the Workers' Compensation Act, and from any other claim for damages for personal injury, including death, and for damages to property which may arise from operations under this contract, whether such operations be by itself or by any subcontractor or anyone directly employed by either of them. Such insurance shall conform to the Insurance Specifications. **(Attachment A)**

**K. Minority and Women-Owned Businesses:**

The County welcomes and encourages the participation of small businesses and businesses owned by women and minorities in procurement transactions made by the County. The County of Henrico actively solicits both small business, women-owned and minority (SWAM) businesses to respond to all Invitations for Bids and Requests for Proposals. All solicitations are posted on the County's Internet site at [www.henrico.va.us](http://www.henrico.va.us) and may be viewed under the Bids and Proposals link on the homepage.

**L. No Discrimination against Faith-Based Organizations:**

Henrico County does not discriminate against faith-based organizations as that term is defined in Virginia Code Section 2.2. -4343.1.

**M. Offeror's Performance:**

1. The Offeror agrees and covenants that its agents and employees shall comply with all County, State and Federal laws, rules and regulations applicable to the business to be conducted under the contract.
2. The Offeror shall ensure that its employees shall observe and exercise all necessary caution and discretion so as to avoid injury to person or damage to property of any and all kinds.
3. The Offeror shall cooperate with County officials in performing the contract work so that interference with normal program will be held to a minimum.
4. The Offeror shall be an independent contractor and shall not be an employee of the County or the Personnel Department.



**N. Ownership of Deliverable and Related Products:**

1. The County of Henrico, Virginia shall have all rights, title, and interest in or to all specified or unspecified interim and final products, work plans, project reports and/or presentations, data, documentation, computer programs and/or applications, and documentation developed or generated during the completion of this project, including, without limitation, unlimited rights to use, duplicate, modify, or disclose any part thereof, in any manner and for any purpose, and the right to permit or prohibit any other person, including the Contractor, from doing so. To the extent that the Contractor may be deemed at any time to have any of the foregoing rights, the Contractor agrees to irrevocably assign and does hereby irrevocably assign such rights to the County of Henrico, Virginia.
2. The selected Offeror shall be expressly prohibited by the terms of any contract resulting from this procurement from receiving additional payments or profit from the items referred to in this paragraph, other than, that which is provided for in the general terms and conditions of said contract.
3. This shall not preclude Offerors from submitting proposals, which may include innovative ownership approaches in the best interest of the County.

**O. Record Retention/ Audits:**

1. The Successful Offeror shall retain, during the performance of the contract and for a period of three years from the completion of the contract, all records pertaining to the Successful Offeror's proposal and any contract awarded pursuant to this Request for Proposal. Such records shall include but not be limited to all paid vouchers including those for out-of-pocket expenses; other reimbursement supported by invoices, including Offeror copies of periodic estimates for partial payment; ledgers, cancelled checks; deposit slips; bank statements; journals; contract amendments and change orders; insurance documents; payroll documents; timesheets; memoranda; and correspondence. Such records shall be available to the County on demand and without advance notice during the Successful Offeror's normal working hours.
2. County personnel may perform in-progress and post-audits of Offerors records as a result of a contract awarded pursuant to this Request for Proposals. Files would be available on demand and without notice during normal working hours.

**P. Severability:**

Any written contract resulting from this RFP shall contain a severability clause, which entire agreement and if any provision is declared invalid the remaining provisions shall nevertheless remain in effect.

**Q. Subcontracts:**

No portion of the work shall be subcontracted without prior written consent of the County of Henrico, Virginia. In the event that the Contractor desires to subcontract some part of the work specified in the contract, the Contractor shall furnish the County the names, qualifications, and experience of the proposed subcontractors. The Contractor shall, however, remain fully liable and responsible for the work to be done by his/her subcontractor(s) and shall assure compliance with all the requirements of the contract.

**R. Taxes:**

1. The Offeror shall pay all county, city, state and federal taxes required by law enacted at the time proposals are received and resulting from the work or traceable thereto, under whatever name levied. Said taxes shall not be in addition to the contract price between the County and the Offeror, as the taxes shall be an obligation of the Offeror and not of the County, and the County shall be held harmless for same by the Offeror.
2. The County of Henrico is exempt from the payment of federal excise taxes and the payment of State Sales and Use Tax on all tangible, personal property for its use or consumption. Tax exemption certificates will be furnished upon request.

**S. Termination Of Contract:**

1. The County of Henrico reserves the right to terminate the contract/purchase order immediately in the event that the Successful Offeror discontinues or abandons operations; if adjudged bankrupt, or is reorganized under any bankruptcy law; or fails to keep in force any required insurance policies or bonds.
2. Failure of the Successful Offeror to comply with any section or part of this contract/purchase order will be considered grounds for immediate termination of the contract/purchase order by the County of Henrico.
3. Notwithstanding anything to the contrary contained in the contract/purchase order between the County and the Successful Offeror, the County may, without prejudice to any other rights it may have, terminate the contract/purchase order for convenience and without cause, by giving 30 days written notice to the Offeror.
4. If the termination clause is used by the County, the Offeror will be paid by the County for all scheduled work completed satisfactorily by the Successful Offeror up to the termination date set in the written termination notice.

**T. Form of Agreement:**

The form of agreement to be used for the project shall be negotiated with the Successful Offeror

**VII. PROPOSAL SUBMISSION REQUIREMENTS:**

- A. The Purchasing Office will not accept oral proposals, nor proposals received by telephone, FAX machine, or other electronic means.

- B. All erasures, interpolations, and other changes in the proposal shall be signed or initialed by the Offeror.
- C. The Proposal Signature Sheet (*Attachment B*) must accompany any proposal(s) submitted and be signed by an authorized representative of the Offeror. If the Offeror is a firm or corporation, the Offeror must print the name and title of the individual executing the proposal. All information requested should be submitted. Failure to submit all information requested may result in the Purchasing Office requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal.
- D. The proposal, the proposal security, if any, and any other documents required, shall be enclosed in a sealed opaque envelope. The envelope containing the proposal shall be sealed and marked in the lower left-hand corner with the number, title, hour, and due date of the proposal.
- E. The time proposals are received shall be determined by the time clock stamp in the Purchasing Office. Offerors are responsible for insuring that their proposals are stamped by Purchasing Office personnel by the deadline indicated.
- F. By submitting a proposal in response to this Request for Proposal, the Offeror represents they have read and understand the Scope of Services and have familiarized itself with all federal, state, and local laws, ordinances, and rules and regulations that in any manner may affect the cost, progress, or performance of the contract work.
- G. The failure or omission of any Offeror to receive or examine any form, instrument, addendum, or other documents or to acquaint itself with conditions existing at the site, shall in no way relieve any Offeror from any obligations with respect to its proposal or to the contract.
- H. **Trade secrets or proprietary information submitted by an Offeror in response to this Request for Proposal shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protection of this section prior to or upon submission of data or materials, and must identify the data or other materials to be protected and state the reasons why protection is necessary (Section 2.2-4342F of the Code of Virginia).**  
**Attachment C**
- I. A proposal may be modified or withdrawn by the Offeror anytime prior to the time and date set for the receipt of proposals. The Offeror shall notify the Purchasing Office in writing of its intentions.
  - 1. If a change in the proposal is requested, the modification must be so worded by the Offeror as to not reveal the original amount of the proposal.
  - 2. Modified and withdrawn proposals may be resubmitted to the Purchasing Office up to the time and date set for the receipt of proposals.

3. No proposal can be withdrawn after the time set for the receipt of proposals and for ninety (90) days thereafter.
  4. Comments as to how the proposal documents, scope of services or drawings can be improved are welcome. Offerors requesting clarification or interpretation of or improvements to the proposal general terms, conditions, scope of services or drawings shall make a written request which shall reach the Purchasing Office, Division of General Services, at least eight (8) days prior to the date set for the receipt of proposals. Any changes to the proposal shall be in the form of a written addendum from the Purchasing Office and it shall be signed by the Director of General Services or a duly authorized representative. **Each Offeror shall be responsible for determining that all addenda issued by the Purchasing Office have been received before submitting a proposal.**
- J. All proposals received in the Purchasing Office on time shall be accepted. All late proposals received by the Purchasing Office shall be returned to the Offeror unopened. Proposals shall be open to public inspection only after award of the contract.

#### **VIII. PROPOSAL RESPONSE FORMAT:**

- A. Offerors shall submit a written proposal that present the Offeror's qualifications and understanding of the work to be performed. Offerors are asked to address each evaluation criterion and to be specific in presenting their qualifications. Your proposal should provide all the information considered pertinent to your qualifications for this project.
- B. The Offeror should include in their proposal the following:
1. Table of Contents – All pages are to be numbered
  2. Introduction
  3. Cover letter - on company letterhead, signed by a person with the corporate authority to enter into contracts in the amount of the proposal
  4. Proposal Signature Sheet – Attachment B, Proprietary/Confidential Information – Attachment C
  5. Executive Summary
  6. Response to Scope of Services –The Offeror should address each section of the Scope of Services with an indication of the response. The Offeror shall identify any exceptions, referenced to the paragraph number, in a sub section titled "Exceptions".
  7. Business Health Summary – Please provide responses to the following specific questions:
    - a. Years in business
    - b. Years in business under your present name.
    - c. By number of customers.
    - d. Provide at least four references that are currently using your firm for services.

8. Project and Support Staffing – Please provide responses to the following specific questions:
  - a. Total number of staff:
  - b. Describe the involvement, if any, of subcontractors in the work
9. Project Management – Please provide a narrative description describing your approach for providing the requested project management services and proposed project schedule.
10. Costs – Provide detailed pricing for all costs associated with providing the services for Section III – Scope of Services.

**IX. PROPOSAL EVALUATION/SELECTION PROCESS**

- A. Offerors are to make written proposals, which present the Offeror's qualifications and understanding of the work to be performed. Offerors are asked to address each evaluation criteria and to be specific in presenting their qualifications. Proposals should be as thorough and detailed as possible so that the County may properly evaluate your capabilities to provide the required goods/services.
- B. Selection of the Successful Offeror will be based upon submission of proposals meeting the selection criteria. The minimum selection criteria will include:

Criteria	Weight
Clearly demonstrated understanding of the work to be performed and the completeness and reasonableness of the Offeror's plan for accomplishing the scope of services..	25%
Special experience, technical capabilities, professional competence, and qualification of the Offeror and proposed personnel assigned to the project.	25%
Current workload and ability to complete the required scope of services within County time constraints, proposed schedule and project management approach. .	20%
Cost of services to be provided by the Offeror	20%
References	5%
Quality of written proposal/oral presentations	5%
<b>Total</b>	<b>100%</b>

- C. Selection will be made of two or more Offerors deemed to be fully qualified and best suited among those submitting proposals. Negotiations shall then be conducted with each of the Offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each Offeror so selected, the County shall select the Offeror, which, in its opinion, has made the best proposal, and shall award the contractor to that Offeror. Should the County determine in writing and in its sole discretion that only one Offeror is fully qualified or that one Offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the Offeror's proposal as negotiated.

**ATTACHMENT A  
INSURANCE SPECIFICATIONS**

The contractor shall carry Public Liability Insurance in the amount specified below, including contractual liability assumed by the contractor, and shall deliver Certificate of Insurance from carriers acceptable to the owner specifying such limits. The Certificate shall show the County of Henrico and Henrico County Public Schools its officers, employees and agents named as additional insured for the Commercial General Liability. The coverage shall be provided by a carrier(s) rated "Excellent" by A.M. Best. In addition, the insurer shall agree to give the County 30 days notice of its decision to cancel coverage.

Workers' Compensation

Statutory Virginia Limits

Employers' Liability Insurance - \$100,000 for each Accident by employee  
\$100,000 for each Disease by employee  
\$500,000 policy limit by Disease

Commercial General Liability

Combined Single Limit - \$1,000,000 each occurrence including contractual liability  
for specified agreement  
\$2,000,000 General Aggregate (other than Products/Completed  
operations)  
\$2,000,000 General Liability-Products/Completed Operations  
\$1,000,000 Personal and Advertising Injury  
\$ 100,000 Fire Damage Legal Liability

**BUSINESS AUTOMOBILE LIABILITY**

Combined Single Limit - \$1,000,000 per occurrence including owned and non-owned vehicles

NOTE 1: Contractual Liability covers the following indemnity agreement:

The Successful Offeror agrees to indemnify, defend and hold harmless the County of Henrico including Henrico Public County Schools, its officers, agents and employees from any claims, damages, suits, actions, liabilities and costs of any kind or nature, including attorneys' fees, arising from or caused by the provision of any services, the failure to provide any services or the use of any services or materials furnished (or made available) by the successful Offeror, provided that such liability is not attributable to the County's sole negligence.

NOTE 2:

The insurance specified above shall apply as primary insurance with respect to any other insurance or self-insurance programs afforded to Henrico County and/or Henrico County Public Schools.

**ATTACHMENT B  
PROPOSAL SIGNATURE SHEET**

My signature certifies that the proposal as submitted complies with all Terms and Conditions as set forth in **RFP #08-8339-2CS**. My signature also certifies that by submitting a proposal in response to this Request for Proposal, the Offeror represents that in the preparation and submission of this proposal, said Offeror did not, either directly or indirectly, enter into any combination or arrangement with any person, firm or corporation or enter into any agreement, participate in any collusion, or otherwise take any action in the restraint of free, competitive bidding in violation of the Sherman Act (15 U.S.C. Section 1 et seq.) or Sections 59.1-9.1 through 59.1-9.17 or Sections 59.1-68.6 through 59.1-68.8 of the Code of Virginia.

I hereby certify that I am authorized to sign as a Representative for the Firm:

NAME OF OFFEROR: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

TAXPAPYER NUMBER (TIN) \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

NAME (print): \_\_\_\_\_

TITLE: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

FAX: \_\_\_\_\_

DATE: \_\_\_\_\_

**SUPPLIER TYPE (Check One)**

- CORPORATION - DOMESTIC
- INDIVIDUAL/SOLE PROPRIETOR - DOMESTIC
- PARTNERSHIP - DOMESTIC
- GOVERNMENT - DOMESTIC
- NON-PROFIT

**BUSINESS CATEGORY (Check all that apply)**

- SMALL BUSINESS
- WOMAN OWNED AND CONTROLLED
- MINORITY OWNED AND CONTROLLED  
(Asian, Hispanic, Eskimos & Aleuts, Native Americans, African Americans)
- NONE OF THE ABOVE



**ATTACHMENT C  
 PROPRIETARY/CONFIDENTIAL INFORMATION IDENTIFICATION**

**NAME OF FIRM/OFFEROR:** \_\_\_\_\_

Trade secrets or proprietary information submitted by an offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protections of §2.2-4342F of the Code of Virginia, in writing, either before or at the time the data or other material is submitted. The written notice must specifically identify the data or materials to be protected including the section of the proposal in which it is contained and the page numbers, and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. In addition, a summary of proprietary information submitted shall be submitted on this form. The classification of an entire proposal document, line item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. If, after being given reasonable time, the offeror refuses to withdraw such a classification designation, the proposal will be rejected.

<b>SECTION/TITLE</b>	<b>PAGE NUMBER(S)</b>	<b>REASON(S) FOR WITHHOLDING FROM DISCLOSURE</b>