

SER Jobs for Progress National, Inc.®

100 East Royal Lane Suite 130 • Irving, Texas 75039

**Request for Quote (RFQ)
Customer Service Training Vendors
Services for the Period of:
June 5 to June 30, 2017**

Released: May 8, 2017

Inquiries and Responses to RFQ should be directed to:

Keith A. Overton, CPA, CFO

(469) 549-3657

Email: aoverton@ser-national.org

REQUEST FOR QUOTE

Customer Service Training Vendors

Response Deadline: 4:00pm Central Time	May 19, 2017
Submission via email	aoverton@ser-national.org
Written Questions Submission Deadline: 12:00pm Central Time	May 12, 2017
Question and Answer Document Published: 4:00pm Central Time	May 15, 2017
Contract Start Date	June 5, 2017
RFQ Point of Contact	Andy Overton CFO Phone: (469) 549-3657 E-mail: aoverton@ser-national.org

Request for Quote (RFQ) Customer Service Training Vendors

SECTION I. GENERAL INFORMATION

A. Purpose of this Request for Quote (RFQ)

SER Jobs for Progress National, Inc. (SER) is contracted by the Department of Labor to operate a portion of the Senior Community Service Employment Program (SCSEP).

The purpose of this RFQ is to select approved vendors to provide quality one-day Customer Service training to SCSEP participants in California, Colorado, Kansas, Missouri, Texas and Wisconsin.

Goods and Services solicited in this RFQ

Refer to Section I. B. Quote Specifications for a detailed listing of the requirements of the Customer Service training.

B. Quote Specifications

Please address the following:

Ability to provide quality Customer Service Training to SCSEP participants with the National Retail Federation (NRF) Foundation curriculum. Trainers will need to become approved (certified) as proctors in accordance with the specifications of the NRF Foundation. Proctors' training will be provided in Irving, Texas week of May 29, 2017. SER National will provide this training at no cost to trainers.

Services will be conducted in the location below and for the number of participants indicated in each location. The selected provider will need to coordinate with SER staff to ensure proper delivery of services. Vendor may submit for all or one location and may combine locations within the state, if feasible and preapproved by SER National. SER National will cover transportation cost, where needed, for participants to attend trainings.

CALIFORNIA

Anaheim	20
Bakersfield	40
Chula Vista	20
El Monte	30
Hemet	40
Inglewood	40
Pasadena	40
Pomona	40
Riverside	20
San Diego	40
Stockton	20
Sun Valley	20
West Covina	30

COLORADO

Fort Collins	20
Grand Junction	20
Lakewood	20
Pueblo	20

KANSAS

Kansas City	40
Leavenworth	20
Salina	20
Topeka	20

MISSOURI

Columbia	20
Saint Joseph	20

TEXAS

Beaumont	20
Houston	80

WISCONSIN

Kenosha	20
Milwaukee	140
Racine	20

Provider will also need to deliver the following:

- Instructor (with appropriate credentials - NRF)
- Proposed Locations within the counties
- Laptops and internet access (minimum of 20)
- Curriculum
 - I. Teach the Customer Service training plan and administer the online test
 - II. Create an email account for participants if they don't have one already
 - III. Register participants for SER On-line Entrepreneurship Program Training (SER MUJER)
- Proposed Schedule (During the weeks of June 5 – 30, 2017) – (8:30 am – 4:30 pm, with a 30-minute lunch break, primary customer service training, 9:00 am – 3:00 pm)
- NRF Certificate of Completion or completing document for each Participants
- \$100 per unduplicated SCSEP eligible participant, sign in signature log required
- Budget: (all inclusive) travel, trainer, meals, computer lab, computers and internet services and lite lunch for participants
- Attend a 1-day training at SER National Office to become a proctor

C. Background on SER

SER Jobs for Progress National, Inc. is a private, non-profit corporation, which receives and administers Federal and State funds to provide employment, training, and support services to eligible economically disadvantaged individuals, dislocated workers and general universal customers. SER is a private, nonprofit corporation and has been determined to be exempt from Federal income tax under Section 501(c) (3) of the Internal Revenue Code.

The SER board of directors is composed of representatives from LULAC, American GI Forum, corporate America, and community based SER Affiliates. The primary responsibility of the SER board is to provide policy and program guidance, and to exercise independent oversight of program activities.

SER is a national network of community-based organizations (CBO's) that formulates and advocates initiatives resulting in the increased development and utilization of America's human resources, with special emphasis on the needs of Hispanics, in the areas of education, training, employment, business and economic opportunity.

SER National aims to develop the capacity of the SER network through the provision of technical assistance, research and planning, program and policy development.

D. Governing Laws

Programs and activities solicited in this RFQ are governed by The US Department of Labor (DOL) policies, applicable Federal and State rules and regulations.

E. Method of Procurement and Type of Contract

All goods and services solicited under this RFQ shall be procured using the competitive negotiation method. SER's intent is to execute a contractual agreement for vendors and/or individuals to provide the quality Customer Service training for SCSEP participants.

F. Eligible Proposer and Competency

SER is prohibited from awarding funds to any party debarred, suspended, or otherwise excluded from, or ineligible for participation in Federal assistance programs in accordance with DOL regulations (29 CFR Part 98). Any interested and qualified individual, organization, or company may submit a quote. Proposer shall demonstrate the necessary technical skills and other resources to deliver the solicited goods and services.

G. Period of Performance

The contract negotiated because of this solicitation may commence on June 5, 2017, with completion of services ending on or before June 30, 2017.

H. Response Deadline

The response deadline is **May 19, 2016 by 4:00pm Central Time**. Quotes must be received via e-mail in PDF format. Submit electronic email RFQ proposal to aoverton@ser-national.org, only one (1) electronic submission via e-mail is required. Official electronically receipt of quotes will be a return email by Andy Overton. Late submissions will be disqualified regardless of circumstances.

Additions or deletions to the quotes must be submitted and included in the quote on or before the deadline. The withdrawal of a quote is allowable in person with proper authorization prior to the response deadline. All quotes become the property of SER.

I. Written Questions Submission

After the issuance of the RFQ, questions must be submitted in writing via email to Andy Overton, aoverton@ser-national.org by Friday, May 12, 12:00pm Central Time. SER will publish the Q&A document on SER website.

J. Governing Provisions and Limitations

The purpose of this RFQ is to ensure maximum, open, free competition in the solicitation of and procurement of goods/services. This RFQ is not to be construed as a purchase agreement or contract or as a commitment of any kind; nor does it obligate SER to award any contract or pay for costs incurred prior to the execution of this contract unless such costs are specifically authorized in writing by SER.

SER reserves the right to:

- Accept or reject any or all quotes received, or to cancel or reissue this RFQ in part or its entirety;
- Award a contract for any goods or services in any quantity that SER determines is in its best interest;
- Reject any quote that fails to conform to the essential requirements of the RFQ;
- Contact any individual or entity listed in the RFQ who may have knowledge of the proposer's experience, performance, and qualifications; and
- Request additional information from any and all proposers.

Proposers shall not, under penalty of law, offer or provide any gratuities, favors or anything of monetary value to any officer, member, employee or agent of SER for having an influencing effect toward their own quote or any other quote submitted hereunder. In addition, no employee, officer, or agent of SER shall participate in the selection, award or administration of a contract supported by federal funds, if a conflict of interest, real or apparent, would be involved.

Proposers shall not engage in any activity that will restrict or eliminate competition. Violation of this provision may cause a quote to be rejected. This does not preclude joint ventures or subcontracts.

The contents of a successful quote may become a contractual obligation if selected for award. Failure of the proposer to accept this obligation may result in cancellation of the award. No pleas of error or mistake shall be available to successful proposer as a basis for release of proposed services at stated price/cost. Any damages accruing to SER because of the proposer's failure to deliver the proposed goods and services may be recovered from the proposer.

A contract with the selected proposer(s) may be withheld, at SER's sole discretion, if issues or questions of compliance are not satisfactorily resolved. Award of the goods and services may be withdrawn if resolution is not satisfactory to SER.

SER reserves the rights to clarify, explain, or verify any aspect of a response to this RFQ, and to require the submission of any price, technical, or other revision to the RFQ that results from negotiations conducted.

K. Selection Process

The quote selection process includes the evaluation, rating, and ranking of the quotes by SER staff members. All respondents to this RFQ shall be notified of their status by mail.

In the selection and award of goods/services procured under this RFQ, SER shall ensure:

- Awards shall be made only to responsible proposers who have demonstrated ability to perform based upon delivering comparable or related services;
- Staff qualifications and technical skills, including a satisfactory record of past performance and experience;
- All quotes considered are received on time and are responsive to the specifications of the RFQ; and positive efforts are made to utilize HUB's in the provision of program services.

SER may, at its discretion, request oral presentations or discussions with the most qualified proposers.

L. Quote Evaluation Criteria

Only quotes submitted on a timely basis will be evaluated, using the following criteria and point system:

- Ability to provide quality Customer Service training within time frame mentioned and meeting the requirements and specifications - **30 Points**
- Capability - **30 Points**

- **Added Value - 10 Points**

Five (5) points will be awarded to responsive quotes providing current documentation of Historically Underutilized Businesses (HUB's) certification by the State of Texas General Services Commission (TGSC), or other bona fide certifying agency. See Section II, B for additional details.

Total possible points = 75

M. Proper Inquiry and Appeal Process

SER is the responsible authority for handling complaints or protests regarding the procurement and quote selection process. This includes, but is not limited to; disputes, claims, protests of award or non-selection for award, source evaluation, or other matters of a contractual or procurement nature. If any proposer disagrees with the procurement and/or selection process, a written appeal may be filed with the President of SER-Jobs for Progress National, Inc. the reason for the appeal within five (5) calendar days from the date of the award. The appeal will be conducted in accordance with the provisions of the complaint procedure.

N. Payment Provisions

Payment shall be made within 30-45 days of the receipt of a properly completed invoice. Invoices are to be submitted/mailed to 100 E Royal Lane #130, Irving, TX 75039.

O. Equal Opportunity

It is the policy of SER to encourage and support equal opportunity in the purchase of goods and services. No person shall, on the grounds of race, color, religion, sex, handicap, national origin, age, citizenship, sexual orientation, marital status, political affiliation or belief, be discriminated against under any program or activity receiving Federal funds.

Participation shall be open to citizens and nationals of the United States, lawfully admitted resident aliens, and lawfully admitted refugees and parolees.

In compliance with the Department of Labor (DOL) regulations implementing Section 504 of the Rehabilitation act of 1973, as amended, no qualified disabled individual shall be discriminated against in the admission or access to, or employment in any program or activity.

SECTION II. INSTRUCTIONS FOR SUBMITTING A QUOTE

A. Quote Response

All quotes must include the following information in the order stated.

- The quote cover sheet must identify a liaison or primary contact person, as well as the signatory authority, a person with the legal authority on behalf of the proposing organization (Attachment A)
- Narrative and budget
- Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transaction (Attachment B)
- Certification regarding Drug-Free Workplace Requirements (Attachment C)

- Certification of Bidder (Attachment D)
- Certificate Regarding Conflict of Interest (Attachment E)
- Certificate of Professional Qualifications, a copy of your HUB certification, if applicable (Attachment F)
- Certification Regarding the Implementation of the Non-Discrimination and Equal Opportunity Provisions (Attachment G)
- Liability coverage of firm (Attachment H) [submit proof of liability insurance]

B. Historically Underutilized Business

SER's goal is to use a Historically Underutilized Businesses (HUB's) whenever feasible. A HUB is defined by the Texas Government Code §2161.001 "a corporation sole proprietorship, partnership, or joint venture formed for the purpose of making a profit in which at least 51% of all classes of the shares of stock or other equitable securities are owned by one or more persons who are socially disadvantaged because of their identification as members of the following groups: Black American, Asian, Pacific American, Hispanic American, American Indian, and Woman." (Attachment F)

C. Format

Quotes must be typed and submitted on 8 ½ x 11" white paper, 1" margins on all four sides, and a 12-point Times New Roman font. Narrative must not exceed 5 pages.

D. Number of Copies

Only one (1) electronic submission in **PDF format** is required by the deadline. All documents submitted must be legible and complete. SER is not responsible for copying incomplete quotes.

E. Quote Subject Line and Submission

Quotes must be titled **RFQ - Customer Service Training Providers** and submitted in via email to averton@ser-national.org

ATTACHMENT FORMS

SER-JOBS FOR PROGRESS NATIONAL, INC.
Request for Quote (RFQ)

ATTACHMENT A

Legal Name of Organization: _____
Head of Organization and Title: _____
Mailing Address: _____ _____
Physical Address (if different): _____ _____
Phone/Fax Number: _____
Quote Contact Person and Title: _____
Contract Signatory Authority and Title: _____

Legal Status:
<input type="checkbox"/> For Profit <input type="checkbox"/> Non-Profit <input type="checkbox"/> Local Organized Labor Agency
<input type="checkbox"/> Sole Ownership <input type="checkbox"/> Partnership <input type="checkbox"/> Other _____
<input type="checkbox"/> Governmental <input type="checkbox"/> CBO

Date Established: _____
Federal ID#: _____
State Controller Identification Number: _____
IRS Number: _____
Is Proposer certified as a historically underutilized business? <input type="checkbox"/> Yes <input type="checkbox"/> No
Certifying Agency: _____
(If yes, a copy of the certification notice is required as an attachment.)

ATTACHMENT B

CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION LOWER TIER COVERED TRANSACTIONS

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR Part98. The regulations were published as Part VII of the May 26, 1988 Federal Register (pages 19160-19211).

1. The prospective recipients of Federal assistance Funds certifies, by submission of this quote, that neither it nor its principles are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by Federal department or agency.

2. Where the prospective recipient of Federal assistance funds is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this quote.

Name of Organization

Name and Title of Authorized Representative

(Signature)

(Date)

ATTACHMENT C

CERTIFICATION REGARDING DRUG FREE WORKPLACE REQUIREMENTS

A. The Proposer certifies that it will continue to provide a drug-free workplace by:

1. Publishing a statement of notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the 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 about:
 - a) The dangers of drug abuse in the workplace.
 - b) The proposer's policy of maintaining a drug-free workplace.
 - c) Any available drug counseling, rehabilitation, employee assistance program and;
 - 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 grant be given a copy of the statement required by paragraph 1.
4. Notifying the employee in the statement required by paragraph 1) that, as a condition of employment under the grant, the employee will:
 - a) Abide by the terms of the statement; and
 - 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 calendar days after such violation.
5. Notifying the agency in writing, within ten (10) calendar days after receiving notice under subparagraph 4b from an employee otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted was working, unless the Federal agency has designated a central point for the receipt of such notices. Notices shall include the identification number(s) of each affected grant.
6. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph 4b, with respect to an employee who is so convicted:
 - a) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirement of the Rehabilitation Act of 1973, as amended; or
 - b) Requiring such employee to participate satisfactorily in drug abuse assistance or rehabilitation program approved for purposes by a Federal, State, or local health, law enforcement, or other appropriate agency
7. Making a good faith to continue to maintain a drug-free workplace through implementation of paragraph 1, 2, 3, 4, 5 and 6.
8. The grantee may insert in the space provided below the site(s) for the performance of work done in connection with the specific grant:

Place of Performance: _____

Check () if there are workplaces on file that are not identified here. () Not Applicable

Name of Applicant Organization:

Name and Title Authorized Signatory:

ATTACHMENT D

CERTIFICATION OF BIDDER

I hereby certify that the information contained in this quote and any attachments thereto is true and correct and may be viewed as an accurate representation of proposed services to be provided by the individual or organization. I certify that no employee, Board member, or agent of SER has assisted in the preparation of this quote; I acknowledge that I have read and understood the requirements and provisions of the RFQ, and that this individual or organization will comply with the Federal regulations and policies. I also certify that I have read and understand that "Governing Provisions and Limitations" presented in this RFQ and will comply with the terms thereof; and furthermore that:

I, _____
(Typed Name of Signatory)

Am the individual, corporation, association, public agency or other entity named as Proposer herein, and that I am legally authorized to sign this quote and submit it to SER on behalf of said organization authority of its governing body.

(ATTEST)

Applicant Signature

Collateral Signature

Typed Name/Title

Typed Name/Title

Date

Date

Subscribed and sworn tome this _____ day of _____ 20_____

in _____ County, State of _____

(SEAL)

Notary Public in and for _____ County, _____

Date Commission Expires: _____

ATTACHMENT E

CERTIFICATE REGARDING CONFLICT OF INTEREST

By signature of this Certificate, Proposer covenants and affirms that:

- 1.) No manager, employee, or paid consultant of the Proposer is a member of the Policy Board, the President, or an employee of SER;
- 2.) No manager or paid consultant of the Proposer is married to a member of the Policy Board, the President, or an employee or SER;
- 3.) No member of the Policy Board, the President or an employee of SER owns or controls more than 10 percent share in the Proposer's organization;
- 4.) No spouse of a member of the Policy Board, President or employees of SER receives compensation from Proposer for lobbying activities as defined in Chapter 305 of the Texas Government Code;
- 5.) Proposer has disclosed within the quote response any interest , fact or circumstances, which does or may present a potential, conflict of interest;
- 6.) Should Proposer fail to abide by the foregoing covenants and affirmations regarding conflict of interest, Proposer shall not be entitled to the recovery of any costs or expenses incurred in relations to any contract with SER and shall immediately refund to SER any fees or expenses that may have been paid under the contract and shall be liable for any other costs incurred or damages sustained by SER relating to that contract.

Name of Individual or Organization submitting application:

Name and Title of Authorized Signatory:

Signature:

Date

ATTACHMENT F

CERTIFICATION OF PROFESSIONAL QUALIFICATIONS

(Provide a copy of your current HUB Certification if applicable)

ATTACHMENT G

CERTIFICATION REGARDING THE IMPLEMENTATION OF THE NONDISCRIMINATION AND EQUAL OPPORTUNITY PROVISIONS

The training provider assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

Section 188 of the Workforce Investment Act of 1998 (WIA), 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;

Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color and national origin;

Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities;

The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and

Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.

Name of Organization

Name and Title of Authorized Representative

Signature

Date

ATTACHMENT H

LIABILITY COVERAGE OF FIRMS (Submit proof of insurance)