BOARD OF COUNTY COMMISSIONERS FOR
ADAMS COUNTY, STATE OF COLORADO

RESOLUTION TO ACCEPT AWARD RECOMMENDATION AND AWARD AN
AGREEMENT FOR RFP 2013.232 CASE MANAGEMENT SOFTWARE
SYSTEM TO IQ BUSINESS GROUP, INC.

Resolution No. 2014-037

WHEREAS, iQ Business Group, Inc., submitted a proposal on November 12, 2013, for a Case Management Software System for the Adams County Information Technology Department/Human Service Department.

WHEREAS, iQ Business Group, Inc., agrees to provide a case management software system for a total amount of $361,695.00 for the first year.

NOW, THEREFORE, BE IT RESOLVED, by the Board of County Commissioners, County of Adams, State of Colorado, that the agreement with iQ Business Group, Inc., for a Case Management Software System be approved.

BE IT FURTHER RESOLVED that the Chairman is hereby authorized to sign the agreement with iQ Business Group, Inc., after approval as to form is completed by the County Attorney's Office.

Upon motion duly made and seconded the foregoing resolution was adopted by the following vote:

Henry_____ Aye
Tedesco_____ Aye
Hansen_____ Aye

<div align="center">Commissioners</div>

STATE OF COLORADO   )
County of Adams   )

I, _Karen Long_ , County Clerk and ex-officio Clerk of the Board of County Commissioners in and for the County and State aforesaid do hereby certify that the annexed and foregoing Order is truly copied from the Records of the Proceedings of the Board of County Commissioners for said Adams County, now in my office.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the seal of said County, at Brighton, Colorado this 27th day of January, A.D. 2014.

County Clerk and ex-officio Clerk of the Board of County Commissioners
Karen Long:

By:

E-Signed by Keisha Hirsch
VERIFY authenticity with ApproveIt
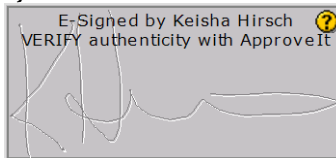
Deputy

ADAMS COUNTY, COLORADO
PURCHASE OF SERVICE AGREEMENT

THIS AGREEMENT ("Agreement") is made this 3rd day of February 2014, by and between the Adams County Board of County Commissioners, located at 4430 South Adams County Parkway, Brighton, Colorado 80601, hereinafter referred to as the "County," and **THE iQ BUSINESS GROUP, INC.**, located at 1410 Spring Hill Road, 4th Floor, McLean, VA 22102, hereinafter referred to as the "Contractor." The County and the Contractor may be collectively referred to herein as the "Parties".

The County and the Contractor, for the consideration herein set forth, agree as follows:

1. **SERVICES OF THE CONTRACTOR:**

   1.1. All work shall be in accordance with the attached **RFP 2013.232** as **Exhibit A** and the Contractor's response to the RFP 2013.232 attached hereto as **Attachments A1-A5**, and incorporated herein by reference. Should there be any discrepancy between **Attachments A1-A5** and this Agreement the terms and conditions of this Agreement shall prevail.

   1.2. Emergency Services: Not Applicable.

2. **RESPONSIBILITIES OF THE COUNTY:** The County shall provide information as necessary or requested by the Contractor to enable the Contractor's performance under this Agreement.

3. **TERM:**

   3.1. Term of Agreement: The initial term of this Agreement shall be for **ninety (90) days** from the date of execution by Adams County Board of County Commissioners, unless sooner terminated as specified elsewhere herein.

   3.2. Extension Options: Not Applicable.

4. **PAYMENT AND FEE SCHEDULE:** The County shall pay the Contractor for services furnished under this Agreement, and the Contractor shall accept as full payment for those services, the sum of **three hundred sixty-one thousand, six hundred ninety-five dollars and no cents ($361,695.00)**, in accordance with the attached fee schedule reference in **Attachment A1** for the initial year.

   4.1. Payment pursuant to this Agreement, whether in full or in part, is subject to and contingent upon the continuing availability of County funds for the purposes hereof. In the event that funds become unavailable, as determined by the County, the County may immediately terminate this Agreement or amend it accordingly.

5. **INDEPENDENT CONTRACTOR:** In providing services under this Agreement, the Contractor acts as an independent contractor and not as an employee of the County. The Contractor shall be solely and entirely responsible for his/her acts, and the acts of his/her employees, agents, servants, and subcontractors during the term and performance of this Agreement. No employee, agent, servant, or subcontractor of the Contractor shall be deemed to be an employee, agent, or servant of the County because of the performance of any services or work under this Agreement. The Contractor, at its expense, shall procure and maintain workers' compensation insurance as required by law. **Pursuant to the Workers' Compensation Act § 8-40-202(2)(b)(IV), C.R.S., as amended, the Contractor understands that it and its employees and servants are not entitled to workers' compensation benefits from the County. The Contractor further understands that it is solely obligated for the payment of federal and state income tax on any moneys earned pursuant to this Agreement.**

6. **NONDISCRIMINATION:** The Contractor shall not discriminate against any employee or qualified applicant for employment because of age, race, color, religion, marital status, disability, sex, or national origin. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices provided by the local public agency setting forth the provisions of this nondiscrimination clause. Adams County is an equal opportunity employer.

   6.1. The Contractor will cause the foregoing provisions to be inserted in all subcontracts for any work covered by this Agreement so that such provisions will be binding upon each subcontractor, provided that the foregoing provisions shall not apply to contracts or subcontracts for standard commercial supplies or raw materials.

7. **INDEMNIFICATION:** The Contractor agrees to indemnify and hold harmless the County, its officers, agents, and employees for, from, and against any and all claims, suits, expenses, damages, or other liabilities, including reasonable attorney fees and court costs, arising out of damage or injury to persons, entities, or property, caused or sustained by any person(s) as a result of the Contractor's performance or failure to perform pursuant to the terms of this Agreement or as a result of any subcontractors' performance or failure to perform pursuant to the terms of this Agreement.

8. **INSURANCE:** The Contractor agrees to maintain insurance of the following types and amounts:

   8.1. Commercial General Liability Insurance: to include products liability, completed operations, contractual, broad form property damage and personal injury.

      8.1.1. Each Occurrence: $1,000,000
      8.1.2. General Aggregate: $2,000,000

   8.2. Comprehensive Automobile Liability Insurance: to include all motor vehicles owned, hired, leased, or borrowed.

8.2.1. Bodily Injury/Property Damage: $1,000,000 (each accident)

8.2.2. Personal Injury Protection: Per Colorado Statutes

8.3. <u>Workers' Compensation Insurance:</u>   Per Colorado Statutes

8.4. <u>Professional Liability Insurance</u>: to include coverage for damages or claims for damages arising out of the rendering, or failure to render, any professional services, as applicable.

8.4.1. Each Occurrence: $1,000,000

8.4.2. This insurance requirement applies only to Contractors who are performing services under this Agreement as professionals licensed under the laws of the State of Colorado, such as physicians, lawyers, engineers, nurses, mental health providers, and any other licensed professionals.

8.5. <u>Adams County as "Additional Insured"</u>: The Contractor's commercial general liability, comprehensive automobile liability, and professional liability insurance policies and/or certificates of insurance shall be issued to include Adams County as an "additional insured," and shall include the following provisions:

8.5.1. Underwriters shall have no right of recovery or subrogation against the County, it being the intent of the parties that the insurance policies so affected shall protect both parties and be primary coverage for any and all losses resulting from the actions or negligence of the Contractor.

8.5.2. The insurance companies issuing the policy or policies shall have no recourse against the County for payment of any premiums due or for any assessments under any form of any policy.

8.5.3. Any and all deductibles contained in any insurance policy shall be assumed by and at the sole risk of the Contractor.

8.6. <u>Licensed Insurers</u>: All insurers of the Contractor must be licensed or approved to do business in the State of Colorado. Upon failure of the Contractor to furnish, deliver and/or maintain such insurance as provided herein, this Agreement, at the election of the County, may be immediately declared suspended, discontinued, or terminated. Failure of the Contractor in obtaining and/or maintaining any required insurance shall not relieve the Contractor from any liability under this Agreement, nor shall the insurance requirements be construed to conflict with the obligations of the Contractor concerning indemnification.

8.7. <u>Endorsement</u>: Each insurance policy herein required shall be endorsed to state that coverage shall not be suspended, voided, or canceled without thirty (30) days prior written notice by certified mail, return receipt requested, to the County.

8.8. <u>Proof of Insurance</u>: At any time during the term of this Agreement, the County may require the Contractor to provide proof of the insurance coverages or policies required under this Agreement.

9. TERMINATION:

9.1. <u>For Cause:</u> If, through any cause, the Contractor fails to fulfill its obligations under this Agreement in a timely and proper manner, or if the Contractor violates any of the covenants, conditions, or stipulations of this Agreement, the County shall thereupon have the right to immediately terminate this Agreement, upon giving written notice to the Contractor of such termination and specifying the effective date thereof.

9.2. <u>For Convenience:</u> The County may terminate this Agreement at any time by giving written notice as specified herein to the other party, which notice shall be given at least thirty (30) days prior to the effective date of the termination. If this Agreement is terminated by the County, the Contractor will be paid an amount that bears the same ratio to the total compensation as the services actually performed bear to the total services the Contractor was to perform under this Agreement, less payments previously made to the Contractor under this Agreement.

10. MUTUAL UNDERSTANDINGS:

10.1. <u>Jurisdiction and Venue:</u> The laws of the State of Colorado shall govern as to the interpretation, validity, and effect of this Agreement. The parties agree that jurisdiction and venue for any disputes arising under this Agreement shall be with the 17th Judicial District, Colorado.

10.2. <u>Compliance with Laws:</u> During the performance of this Agreement, the Contractor agrees to strictly adhere to all applicable federal, state, and local laws, rules and regulations, including all licensing and permit requirements. The parties hereto aver that they are familiar with § 18-8-301, <u>et seq.</u>, C.R.S. (Bribery and Corrupt Influences), as amended, and § 18-8-401, <u>et seq.</u>, C.R.S. (Abuse of Public Office), as amended, and that no violation of such provisions are present. Contractor warrants that it is in compliance with the residency requirements in §§ 8-17-101, et seq., C.R.S. Without limiting the generality of the foregoing, the Contractor expressly agrees to comply with the privacy and security requirements of the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

10.3. <u>Record Retention:</u> The Contractor shall maintain records and documentation of the services provided under this Agreement, including fiscal records, and shall retain the records for a period of three (3) years from the date this Agreement is terminated. Said records and documents shall be subject at all reasonable times to inspection, review, or audit by authorized federal, state, or County personnel.

10.4. <u>Assignability:</u> Neither this Agreement, nor any rights hereunder, in whole or in part, shall be assignable or otherwise transferable by the Contractor without the prior written consent of the County.

10.5. <u>Waiver:</u> Waiver of strict performance or the breach of any provision of this Agreement shall not be deemed a waiver, nor shall it prejudice the waiving party's right to require strict performance of the same provision, or any other provision in the future, unless such waiver has rendered future performance commercially impossible.

10.6. <u>Force Majeure:</u> Neither party shall be liable for any delay or failure to perform its obligations hereunder to the extent that such delay or failure is caused by a force or event beyond the control of such party including, without limitation, war, embargoes, strikes, governmental restrictions, riots, fires, floods, earthquakes, or other acts of God.

10.7. Notice: Any notices given under this Agreement are deemed to have been received and to be effective: (1) three (3) days after the same shall have been mailed by certified mail, return receipt requested; (2) immediately upon hand delivery; or (3) immediately upon receipt of confirmation that an E-mail was received. For the purposes of this Agreement, any and all notices shall be addressed to the contacts listed below:

County:

Department:	Adams County IT and Human Services Department and
Contact:	Steve Hartley, Project Manager
Address:	4430 S. Adams County Pkwy 3rd Floor, Suite C3000
City, State, Zip:	Brighton, Colorado 80601
Office Number:	720.523.6139
E-mail:	shartley@adcogov.org

Department:	Adams County Attorney's Office
Address:	4430 South Adams County Parkway
City, State, Zip:	Brighton, Colorado 80601

Contractor:

Company:	The iQ Business Group, Inc.
Contact:	Michael D. Beck, President/CEO
Address:	1410 Spring Hill Road, 4th Floor
City, State, Zip:	McLean, VA 22102
Office Number:	1-678-388-1815
E-mail:	mbeck@iqbginc.com

10.8. Integration of Understanding: This Agreement contains the entire understanding of the parties hereto and neither it, nor the rights and obligations hereunder, may be changed, modified, or waived except by an instrument in writing that is signed by the parties hereto.

10.9. Severability: If any provision of this Agreement is determined to be unenforceable or invalid for any reason, the remainder of this Agreement shall remain in effect, unless otherwise terminated in accordance with the terms contained herein.

10.10. Authorization: Each party represents and warrants that it has the power and ability to enter into this Agreement, to grant the rights granted herein, and to perform the duties and obligations herein described.

11. CHANGE ORDERS OR EXTENSIONS:

11.1. Change Orders: The County may, from time to time, require changes in the scope of the services of the Contractor to be performed herein including, but not limited to, additional instructions, additional work, and the omission of work previously ordered. The Contractor shall be compensated for all authorized changes in services, pursuant to the applicable provision in the Invitation to Bid, or, if no provision exists, pursuant to the terms of the Change Order.

12. COMPLIANCE WITH C.R.S. § 8-17.5-101, ET. SEQ. AS AMENDED 5/13/08:

Pursuant to Colorado Revised Statute (C.R.S.), § 8-17.5-101, *et. seq.*, as amended May 13, 2008, the Contractor shall meet the following requirements prior to signing this Agreement (public contract for service) and for the duration thereof:

12.1. The Contractor shall certify participation in the E-Verify Program (the electronic employment verification program that is authorized in 8 U.S.C. § 1324a and jointly administered by the United States Department of Homeland Security and the Social Security Administration, or its successor program) or the Department Program (the employment verification program established by the Colorado Department of Labor and Employment pursuant to C.R.S. § 8-17.5-102(5)) on the attached certification.

12.2. The Contractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.

12.3. The Contractor shall not enter into a contract with a subcontractor that fails to certify to the Contractor that the subcontractor shall not knowingly employ or contract with an illegal alien to perform work under this public contract for services.

12.4. At the time of signing this public contract for services, the Contractor has confirmed the employment eligibility of all employees who are newly hired for employment to perform work under this public contract for services through participation in either the E-Verify Program or the Department Program.

12.5. The Contractor shall not use either the E-Verify Program or the Department Program procedures to undertake pre-employment screening of job applicants while this public contract for services is being performed.

12.6. If Contractor obtains actual knowledge that a subcontractor performing work under this public contract for services knowingly employs or contracts with an illegal alien, the Contractor shall: notify the subcontractor and the County within three days that the Contractor has actual knowledge that the subcontractor is employing or contracting with an illegal alien; and terminate the subcontract with the subcontractor if within three days of receiving the notice required pursuant to the previous paragraph, the subcontractor does not stop employing or contracting with the illegal alien; except that the contractor shall not terminate the contract with the subcontractor if during such three days the subcontractor provides information to establish that the subcontractor has not knowingly employed or contracted with an illegal alien.

12.7. Contractor shall comply with any reasonable requests by the Department of Labor and Employment (the Department) made in the course of an investigation that the Department is undertaking pursuant to the authority established in C.R.S. § 8-17.5-102(5).

12.8. If Contractor violates this Section, of this Agreement, the County may terminate this Agreement for breach of contract. If the Agreement is so terminated, the Contractor shall be liable for actual and consequential damages to the County.

ATTACHMENT A
(All Documents following this page of the Agreement)

Attachments:

1. BAFO, dated December 5, 2013

2. Proposal, dated November 18, 2013

3. Addendum One, dated November 7, 2013

4. Offeror's Signed Certificate of Compliance for RFP 2013.232, dated November 18, 2013

5. Offeror's Statement/Signature Page for RFP 2013.232, dated November 18, 2013

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3.4   Fee Schedule

ATTACHMENT A
FEE SCHEDULE

The Offeror is responsible for all labor, supplies and materials to perform the services as identified in the scope of services. Offeror's fees as detailed below shall be firm through the entire term of the awarded agreement.

1   Implementation Services

Discipline	Number of Hours	Hourly Rate		Total	
Project Manager	230	$	150	$	40,250
Process Consultant	174		150		30,450
Senior Technical Consultant	230		150		40,250
Staff Consultant	104		125		15,600
Transition Manager	162		225		36,450
Technical Architect	176		225		39,600
10% Discount on Services					-20,260
Sub Total				$	182,340

2   Software

	Licenses	Unit Cost		Total	
Assure Work Center (named users)	200	$	701.50	$	140,300
Assure Work Center (anonymous users)	1000		14		14,000
MBPM Integration for eDocs	1		6,500		6,500
Sub Total				$	160,800

3   Provide Training Courses onsite at the County for three (3) employees

Discipline	Number of Hours	Hourly Rate		Total	
Training Coordinator	24	$	125	$	3,000
Sub Total				$	3,000

	Number of Years	Annual Rate			
4 Maintenance Warranty for three (3) years	3	$	32,160	$	96,480
Sub Total				$	96,480

Total Services (1+3)	$	168,375
Total Software (2)		160,800
Total Maintenance(4)		96,480
Grand Total	$	426,015

1. **Clarify if multiple workers can access a case simultaneously?**

   o The to-do list and watch list capabilities in Assure are based on user and/or user group configurations. These concepts provide the ability for multiple workers (or teams) to be able to access the same case simultaneously.

2. **Clarify if a case can be locked or checked out, so that, only a single worker has access at a time?**

   o Once a worker has indicated their intent to work on a case – access rules can be configured to enable the user to have exclusive ownership of the case, and lock out access to other users. This results in the case residing in the worker's to-do list, but the case can still be made available to be "viewed" by others through their respective watch lists. A user can choose to return the work item/case to the group's or team's to-do list if necessary, thereby making it available for others to work on.

3. **Explain in details what skill set a power user would need to be able to design new workflows?**

   o IQ has proposed the use of Assure, which offers a prepackaged solution for Case Management and case templates. In Assure, a Task Template is the primary mechanism for designing new workflows. Task Templates offer a grid style routing table that creates tasks and are assigned to teams or individuals. They also define the deadline, expected duration and any dependencies on other tasks. Task Templates offer the fastest time to value and the only skill required for creation of new workflows is and understanding of the work to be completed.

   If a more customized solution is desired or required the BPM designer offers a graphical drag and drop workflow map designed for business users. The underlying technology behind Assure is very mature and complete BPM package that can be utilized if organizations desired. Here anyone who is familiar with the ribbon bar style software such as PowerPoint and Visio can design workflows. When and if code level development is required a developer can do it in an appropriate development environment and add it to the graphical drag and drop environment as a library.

4. **Please provide a hardware/software requirement list for the Assure product?**

   o Hardware Requirements

Component	Processor	Memory	Disk Space
MBPM Process Engine	2 GHz	2 GB	30 MB
MBPM Designer	2 GHz	2 GB	5 MB
MBPM Deployment Service	2 GHz	1 GB	
MBPM Administrative Tools	500 MHz	1 GB	6 MB
MBPM Client		1 GB	6 MB
Web Server Extensions			11 MB
Web Server		1 GB	

o Software Requirements

Module	Environment
MBPM Process Engine	• Windows 2008 • COM+ • Microsoft.NETFramework4 • VisualC++2010SP1Redistributable
MBPM Designer	• Windows XP, Windows 2008, Windows Vista, Windows 7 • Microsoft.NETFramework2 To enable MBPM Designer debugging, you must have Microsoft Visual Studio 2010 Professional.
MBPM Deployment Service	• Windows 2008 • Microsoft.NETFramework2 The default setting for the Net.TCP Port Sharing Service is a disabled startup type. Change it to an automatic or manual startup type. When starting the MBPM Deployment Service in Windows Vista or Windows Server 2008, use the Local System or Network Service account or a user that is a member of the IIS_IUSRS or Administrators group. The Power Users and all other groups have insufficient privileges to start the service.
MBPM Administrative Tools	• Windows 2008 (with Internet Explorer enhanced security settings disabled) • IIS with ASP.NET • Microsoft.NETFramework4 I MSXML6.0
MBPM Client	Windows XP, Windows 2008, Windows Vista, Windows 7 Internet connection for HTTP access Microsoft Internet Explorer
Web Server Extensions	• Windows 2008 • IIS with ASP.NET • Microsoft .NET Framework 4 • Visual C++ 2010 SP1 Redistributable
Web Server	• Microsoft .NET Framework version 4 • Microsoft IIS • MBPM Process Metadata Service

5. **Are there any browser dependencies for the Assure product?**

   o Browser Dependencies

	Windows XP	Windows Vista	Windows 7	Windows Server 2008/ Windows Server 2008 R2
IE 8.0	x	x	X	x
IE 9.0		*	X	x
Firefox 22	x	x	X	x
Google Chrome 27	x	X	X	x

* Compatible only when you install SP2 on Windows Vista.

Notes
Review the following notes for MBPM supported web browsers:
- Although MBPM supports Internet Explorer 8 and 9, form rendering (particularly of large forms) is significantly faster with later versions of Internet Explorer, or FireFox. OpenText strongly recommends that users of Internet Explorer use later versions.
- Some features of the BPM Web Client function better in IE 9 native mode. For example, using BPM URLs to access reports can sometimes not display report data in compatibility mode.
- By default, OpenText MBPM install adds a value (IE=EmulateIE7) to the HTTP response headers section in the MetaStorm IIS application to provide support for IE 8 and 9 running in compatibility mode.
- To enable support for IE 9 native mode, the HTTP response header mentioned in the previous bullet point should be removed from the web application in IIS. Note that this can affect the users connecting to the Web Client with IE 8 Browsers.
- Due to a defect in Internet Explorer 7, the browser leaks memory if forms are closed using the Close button on the top right corner of the form. For more information, see the following link: http://support.microsoft.com/kb/975736.
- When using Internet Explorer on server operating systems, uninstall or disable the Enhanced Security Configuration.
- With Windows SSO enabled, the web server should be added to the browser's list of local Intranet sites. Also, web browser must be set to automatically login to Intranet zones.
- When you install the MSN Live toolbar, some of the MBPM Web Client features do not work as expected. For example:
  - The Most Recently Used (MRU) lists are not visible unless at least two browser tabs are open.
  - The login pane appears behind the main browser window.

6. **Jeff Martin mentioned in the demo that OpenText put a price hold on the Assure license. How long is that hold and what will be the increase when the hold expires?**

   - The Assure license is a perpetual cost so Adams will own the product. There is a three (3) Year hold for Assure Support. There will be a 5% increase when the three-year hold period expires.

7. **Your proposal fees state that your fees do not include business and travel expenses. Provide an example of common business expenses that can be incurred?**

   - Business expenses include travel expenses (air fare, rental cars, mass transit), accommodations and GSA schedule per diems for meals.

ADAMS COUNTY
COLORADO

Proposal

Adams County, Colorado

Case Management System

Solicitation No.: 2013.232

Due November 18, 2013 at 4:00 p.m.

Submitted to:

the **iQ** Business Group
intelligence applied.
1410 Spring Hill Road
4th Floor
McLean, VA 22102
678-388-1815 (p), 678-302-4415 (f)
DUNS: 173064267, TIN: 04-3581891
www.iqgroup-usa.com

Heidi Casteel
Adams County Government Center
Purchasing Division
4430 South Adams County Parkway
Brighton, CO 80601

November 18, 2013

Heidi Casteel
Adams County Government Center
Purchasing Division
4430 South Adams County Parkway
Brighton, CO 80601
RE: Adams County Formal Request for Proposal 2013.232 – Adams County Case Management System, Human Services Department

Dear Ms. Casteel:

The IQ Business Group Inc. (IQBG) is pleased to submit this Proposal dated November 18, 2013 to Adams County, Human Services Department for a Case Management System.

For more than ten years, IQBG has been a global provider of business and technology consulting services covering virtually every aspect of Enterprise Content Management (ECM) including image scanning solutions and document management solutions. IQBG is highly experienced with client intake, eligibility verification, benefit assessment processes, and our ECM integration including solutions with Kofax Capture 10 software. Specifically related to Adams County, IQBG was awarded the OpenText Integrator of the Year for 2012. IQBG designs and integrates the document and records management functionality provided by OpenText with line of business systems that blend structured and unstructured work processes.

Our document management and business workflow implementations include many public sector (including the IRS, US Postal Service, and United Nations) and private sector (including Coca-Cola Enterprises, American Express, and Intel) clients. IQBG is the exclusive provider of content and records management services to the federal government under the GSA SmartBUY contract. IQBG has in-depth knowledge of implementing ECM systems that provide secure storage of case documents while designing taxonomy and permission structures in support of highly functional search and access by all required parties including those external to an organization.

IQBG is proposing a solution that uses OpenText 'Assure' to implement Case Management for Adams County. Assure is a BPM tool with extensions for common business process tasks that is built on top of OpenText MetaStorm BPM (MBPM) and is tailor-made for the case management domain. Assure will enable Adams County to become more efficient at performing and delivering case management related service and support functions while protecting its already made investments by effectively integrating with existing technology platforms and consuming data from existing data repositories.

Most recently, IQBG consultants have just completed the implementation of a case management system for the Virginia State Bar (VSB) using OpenText ECM solutions that will also be leveraged with Adams County. IQBG assisted VSB with the scanning and OCR processes for several hundred thousand pages of back case files. The result is that VSB now has a secure, full-text and metadata searchable repository of past case files including ruling and orders – staff can now research past decisions without having to search and review stacks of paper files saving them a tremendous amount of time and allowing them to spend their time much more productively.

IQBG is very excited about Adams County's strategic initiative to improve case management and processing to allow its 200 case workers better manage and track the business processes involved with administering CBMS. We look forward to having an opportunity to discuss our proposal with Adams County.

If you have any questions, please do not hesitate to contact us.

Sincerely,

Michael D. Beck
President/CEO
The IQ Business Group, Inc.

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1.0 Experience

IQBG Overview: IQBG is a leading provider of information management solutions to highly regulated industries and the public sector. Our enterprise information management (EIM) core competencies include enterprise content management (ECM), records management (RM), business process and customer experience management, information exchange, and discovery. Our subject matter experts (SMEs) and engineers combine industry intelligence with leading technologies to provide a broad range of services in all aspects of pension, defined contribution and health and welfare administration in support of benefits case management systems.

IQBG has experience with the OpenText eDocs 5.3.1 product set, Kofax Capture 10 scanning and capture solutions and with the implementation of Case Management that integrate OpenText products with capture and case management solutions. Recently, IQBG has integrated OpenText software and a proprietary Case Management System at the Philadelphia District Attorney's Office to improve efficiency of legal discovery development and distribution. Also in the past year, IQBG has provided full life-cycle management of cases from intake assessment and action determination for the Virginia State Bar. In both systems, all documents related to a case are made available to appropriate case workers and others involved in the case (including external parties) in a secure and managed process. Both peer-to-peer ad-hoc and formal workflows have been implemented to standardize business processes, support decision processes, and facilitate review and approval processes. All documents related to a case – correspondence, emails, faxes, notes, orders, subpoenas, costs and receipts, etc. – are maintained in a secure repository that is linked to appropriate views within the case management applications and are readily available in both the document management and case management systems through highly functional search. Table 1.0-1 below shows the dates and costs associated with these recent Case Management projects.

TABLE 1.0-1. RECENT IQBG CASE MANAGEMENT PROJECTS

Case Management Project Client	Project Description	Begin Date	End Date	Cost	
Virginia State Bar	Enterprise Content and Records Management including the design and implementation of Professional Regulation Case Management, image scanning and backfile conversion, workflow processes related to Membership, Continuing Education, Intake, Case Assessment, Case Analysis, Case Disposition, and long-term retention of Discipline Imposed Cases	January 2013	August 2013	$260,850	Additional project work for other business units and enhancements related to Financial and HR System integration continues.
City of Philadelphia	A document and records management system integrated with a structured Case Management system to to improve efficiency of legal discovery development and distribution,	November 2011	Present	$1.2 M	Project is on-going

OpenText Overview: OpenText joins with IQBG services to offer its leading Business Process Management (BPM) software. BPM is a key part of its Enterprise Information Management (EIM) set of technologies and business solutions which enable organizations of all sizes and industries to manage, secure, and leverage their unstructured business information. For Adams County, this means that OpenText's deep strength and heritage in Enterprise Content Management (ECM) can be combined with tightly integrated BPM and ECM components to meet Adams County's structured and unstructured information management challenges surrounding the CBMS case process.

Quick Facts about OpenText:

- Year Founded: 1991
- Market Segment: Enterprise Information Management (EIM) software
- Fiscal Revenue 2013: US$1,363,336,000
- Number of Employees: About 5,000
- Stock Symbols: NASDAQ - OTEX; TSX - OTC

2.0 Key Personnel

IQBG commits to providing an experienced and dedicated project manager; and confirms that the staff listed in this proposal will actually perform the contracted services. Our experience with OpenText and years of BPM and case management experience enables us to deliver the Adams County requirements within the County's proposed schedule. IQBG will not remove staff without notifying the County and will submit names and qualifications of any replacements for the County's approval.

The IQBG resources that will be assigned to this project are provided in Table 2.0-1, followed by a brief description of their roles. A more detailed presentation of their experience is provided in Section 2.1 below.

TABLE 2.0-1. KEY PERSONNEL

Name	Role	# of Hours
Jason Hall	Project Manager	230
Greg Lloyd	Process Consultant	174
Wynne Ng	Senior Technical Consultant	230
Richard Molique	Staff Consultant	104
Pawan Wahi	Technical Architect	176
Theresa Collins	Transition Manager	162

- **Project Manager.** Jason Hall is an experienced BPM project manager who will be dedicated to the Adams County project. Jason will be responsible for all communications with Adams County and for project reporting, problem resolution, IQBG resource management, and overall project leadership.
- **Process Consultant.** Greg Lloyd, who is very experienced in the Case Management and Benefits areas, will be the Process Consultant responsible for the overall solution approach, configuration analysis, and business process analysis. Greg will be more heavily used at the front end of the project, and will scale back as the project moves through Technical Services and into Production.
- **Transition Manager.** Theresa Collins will serve as the Transition Manager and will contribute to the design of the overall solution configuration. While IQBG will commit Theresa at whatever level to successfully deliver the County's requirements, it is estimated that Teresa will carry approximately a 50% workload for the duration of the project.
- **Technical Architect.** Pawan Wahi will serve as the Assure Architect and will design and code all integration points into and out of the solution, as well as any other complex configurations or customizations that may be required. Pawan will work on an as-needed basis under the direction of the IQBG Project Manager.
- **Senior Technical Consultant.** Wynne Ng will serve as IQBG's Technical Consultant and will be responsible for the fundamental implementation of the solution, as well as any configurations and customizations not performed by the Assure BPM Architect.
- **Staff Consultant.** Richard Molique will serve as the Staff Consultant and perform configuration and implementation at the direction of the Senior Technical Consultant. Richard was the primary technical lead for the Virginia State Bar's case management implementation.

2.1   Professional Experience

Jason Hall, Project Manager

U.S. Securities & Exchange Commission, IT Specialist (Sr. Analyst) [Federal Employee], 2012 - 2013

- Led the implementation of a Requirements Engineering Center of Excellence that provided leadership, best practices, research, support and training related to the Requirements Elicitation practice at the Commission.
- Managed 17 staff in support of the technical build out of an ECM Walk-in Development Center (WIDC) and provided oversight of performance, performance measurement, strategy and management, budgeting, internal controls, key initiatives, and tracking and reporting for senior management.
- June 2013: Presented with an "IT Excellence Award" by Chairman Mary Jo White for the design and development of an ECM Knowledge Management solution that revolutionized the SEC Enforcement locates case law data.
- April 2012: Presented with an "Achievement Award" by Chairman Mary Shapiro for the design and development of an ECM solution distributed Commission-wide in support of the Chief Ethics Office.

U.S Securities & Exchange Commission, IT Consultant [Contractor] H3 Solutions/API Inc 2004 - 2012

- Developed a vision, expertise, acumen and leadership vital to breaking down communication barriers between stakeholders and developers in order to insure projects were executed on time and within budget.

- Responsible for the creation of detailed financial regulatory business process rules in support of system requirements that translated user requirements into complex ECM workflow solutions.

Marketing & Business Management, 1996 -2000

Designermale.com / Array Connector / Wiborg Vinyl / H&L / InfoStrat

- Positioned start-up, Verid, as a visionary in e-commerce fraud prevention; introduced integrated marketing that multiplied sales; instituted analytics that optimized ROI.
- Launched a designer clothing e-business; authored a plan that won $2,000,000 in funding and managed marketing for sponsorships with the Florida Panthers and advertisements in GQ magazine. (1999-2000)
- Designed a web portal that branded manufacturing company, Array Connector and established new revenue streams; improved production scheduling; negotiated large contracts as purchasing manager. (1997-1999)
- Rescued the Wiborg Vinyl manufacturing business; improved quality processes and eliminated $200,000 in annual losses; created a national image that attracted a buyer. (1996-1997)

Greg Lloyd, Process Consultant

IQ Business Group, Inc., Product/Program Manager, May 2005 to Present

Philadelphia District Attorney's Office (2011-present)

- Project Manager for a team implementing OpenText content server at the Philadelphia District Attorney's office. The application integrates systems from the District Attorney's office (Case Management and Document Management), Philadelphia Police Department, and First Judicial District courts.
- Consultant assisting in the design of processes to improve the development and distribution of legal case discovery information.

Citizens Bank (October 2010 - January 2012)

- Project Manager with workstream responsibility within Dodd Frank PMO. Responsible for developing standards for the entire PMO for status reporting utilizing MS Excel, SharePoint, and PowerPoint. Standard reporting feeds management dashboard. 2012 Budget for Dodd Frank change management is in excess of $120MM. Responsible for directing business analysts in the collection and documentation of business requirements (including use cases, and SWOT, SIPOC, MoSCoW techniques).

Catalyst Rx (November 2011-November 2012)

- Designed proprietary generation processing system for a leading Pharmacy Benefit Manager and led IQ programming team. Responsible for all phases of the SDLC. Application architecture includes a .Net Windows Forms application (C#), a library (C# DLL) containing the business logic, and MS SQL Server. The C# DLL is also exposed to MS Excel as an add-in allowing users to access the same business specific functions and data from within Excel.

Towers Perrin, Senior Application Development Manager, May 1989 to May 2005

- Responsible for the product development and maintenance of Towers Perrin's mission critical Health & Welfare administration module and VendorManager. Fortune 1000 clients were administered using the system to generate revenue of approximately $125 million annually. The applications leveraged a variety of technologies including J2EE and Microsoft technologies and Oracle.
- Coordinated annual updates to client enrollment sites and client Open Enrollment events.
- Contributed to the product design and implementation of the Defined Benefit administration module. The DB module and the HW module were both accessible via single client specific participant web sites.
- Manager of over 35 technical staff including but not limited to WebLogic developers and administrators, Visual Basic developers, Oracle and SQL server DBAs, web developers leveraging HTML, XML and other technologies.

Theresa Collins, Transition Manager

Symantec, Engagement Manager, February 2012 – November 2012

As Engagement Manager I worked closely with the Executive Sponsor and other stakeholders to define the scope and subsequent requirements for implementation of significantly customized solution. I managed the effort across multiple groups and interfaced with various levels of the organization.

- Facilitated Workshops to define and document requirements
- Managed daily scrum meetings to ensure the developers were making adequate progress
- Provided oversight of developers work effort to ensure in alignment with the program goals
- Performed System Testing and worked with the developers to resolve issues before customer UAT
- Worked with customer resources regarding integrations and ensuring requirements were met both from a process and technical perspective

Global Payments, Engagement Manager, September 2010 - Present

As Engagement Manager for three years, I continue to work with the Executive Sponsor and their delegates toward continuous improvement opportunities. Initial rollout included assisting the customer with the following:

- Consulted with Executive Sponsor to define and document the short, medium and long term IT Service Management Strategy
- Facilitated Workshops to define and document requirements for each phase of the effort to include process design as well as tool enablement
- Communication Plan preparation and execution while working with the sponsor to ensure cultural adoption
- Executing Training Plan to provide process familiarization and train the trainer sessions
- Testing of all enhancements prior to customer UAT
- Coordination of any remediation efforts required to meet customer requirements
- Production support for routine maintenance/improvement opportunities

Pawan Wahi, Technical Architect

OpenText Corporation, Engagement Manager / Technical Architect

Pawan Wahi has over 12 years' experience in software engineering, technical architecture, and application design/development with particular emphasis on web-based business process automation solutions using the OpenText BPM platform.

- Engagement Management
  - Manage and maintain key account relationships
  - Successful delivery and execution of projects across various clients/industries
  - Lead multiple technical/non-technical teams
  - Financial, scope and budget management for projects
  - Maintain project plans and status updates
- Business Process Management
  - Performed requirements analysis and requirements gathering for various MBPM projects. Gathered, analyzed, prioritized and obtained agreement on specifications for multiple user groups. Verified that the business requirements supported the business areas needs.

- Technical Team Lead responsible for successful execution and delivery of various applications using MBPM product across multiple industries.
- Assisted clients with defining center of excellence and establishing development standards
- Lead the development and implementation of MBPM Advanced Practices
- Perform architecture/process assessments for existing solutions and recommend areas of improvements
- Advise/Assist on the system architecture and installation based on client requirements
- Training and Enablement
    - Conduct Best Practices Labs to train client developers
    - Present at User Conferences and Internal Events
    - Guide and mentor junior consultants

Key Clients/Industries include, Forest Pharmaceuticals, Pfizer, Eisai, M&T Bank, CITI, Life Sciences, Chubb Insurance, GEICO, DePaul University, Financial, Insurance, Manufacturing & Life Sciences.

A2Z Inc., Sr. Application Developer

Responsible for development and extension of core product including new version releases and service updates. Led the deployment and monitoring of client installations. Provided customer training and technical support.

Wynne Ng, Senior Technical Consultant

IQ Business Group, Inc., Sr. Technical Consultant, 2011 - Present

- Created customized software using ActionSript and PHP.
- Development of remittance software using C#/SQL Server.
- Development of email/fax notification system using C#/SQL Server.
- Development of web based statistical reporting software using C#/JQuery/SQL Server/ASP.NET

Princeton Financial Systems, Inc., 1998 - 2003

Design and implementation of a portfolio accounting system written in C++/MFC/COM with the client data stored in Oracle and Btrieve.

Towers Perrin Inc., 1988 – 1997

- Developed an end-user retirement planning tool using C++ and Visual Basic.
- Developed and maintained the in-house employee benefit information system using FORTRAN, COBOL, and Focus.

Martin E Segal Co., 1987 – 1988

Designed and implemented COBOL programs for the Employee Benefits Systems Division - 401k plans. Analyzed and modified existing sub-systems. Trained and assisted end users. Wrote programmer-level documentation.

Frankel Technologies, 1986 – 1987

Wrote and maintained invoicing and inventory programs using COBOL.

Richard Molique, Staff Consultant

Virginia State Bar, Richmond, VA

Architected, designed, and developed Content Server (CS) 10 based on requirements. Developed synchronization solution between OpenText and custom line of business solutions. Identified, evaluated and implemented Content Server and Archive Server modules: Advanced Workflow, Content Capture, Tempo, eForms, and Object Importer.

NC Department of Transportation, Raleigh, NC

Architected, designed, and developed Content Server (CS) 10 based on state requirements. Identified, evaluated and implemented Content Server and Archive Server modules: Advanced Workflow, File System Archiving; FSA

Document Pipeline; Web Services; OpenText Application Governance & Archiving for Microsoft SharePoint; Advanced Attribute Management via SQL forms.

Virginia State Board of Elections, Richmond, VA

Architected, designed, and developed ECM Solution based on state requirements. Consult clients on the deploying and managing of an Enterprise Content Management solution. Provide high-level customer support to end users including knowledge transfer, documentation and training. Assist in development and documentation of client requirements regarding build of components to ECM system products. Configure and Implement components of the complete ECM solution including Taxonomies, Metadata, Permissions, Document Rules and Workflows. Design and implement solutions for migrating shared drive and scanned content to managed ECM repositories. Advance Workflow and Services development for SpringCM.

Virginia Department of Corrections, Richmond, VA

Architected, designed, and developed multiple ECM Solutions based on state Accounts Payable, Juvenile Justice, and Central Criminal Records requirements.

- Consult clients on the deploying and managing of an Enterprise Content Management solution.
- Provide high-level customer support to end users including knowledge transfer, documentation and training.
- Assist in development and documentation of client requirements regarding build of components to ECM system products.
- Configure and Implement components of the complete ECM solution including Taxonomies, Metadata, Permissions, Document Rules and Workflows.
- Design and implement solutions for migrating shared drive and scanned content to managed ECM repositories.

3.0   Project Approach

The IQ Business Group, Inc. (IQBG) will serve as the prime contractor and will be responsible for program management and the installation of the business process management software necessary to meet the project requirements. IQBG will draw on our proven success in process engineering, and program and project management to provide superior support to Adams County under this contract. Our Project Manager has more than ten years of experience and will follow PMI Body of Knowledge (PMBOK) best practices. Our Process and Technical Consultants will leverage the Business Analyst Body of Knowledge (BABOK) including Lean and Six Sigma techniques to document and model processes, gather requirements, and analyze operations. For Adams County, we will establish the software solution and provide training suitable to allow the County staff to begin rapid development and deployment of automated processes to support case management.

The tool that IQBG is recommending to support Case Management for Adams County is "Assure" from OpenText. Assure is a BPM tool with extensions for common business process tasks that is built on top of OpenText MetaStorm BPM (MBPM). Assure is tailor-made for the case management domain and even ships with a SmartProcess application for HR. OpenText Assure for HR offers a flexible case management and employee self-service experience to help effectively manage and rapidly deliver HR process services supporting recruitment, on-boarding, training, benefits, appraisals, and more. Our proposal to install and configure Assure will exceed the objectives of the Adams County Case Management.

Assure will allow the County to implement and easily link applications and human actions in end-to-end processes. The Assure platform provides a central data model that is leveraged in completing processes; and, also provides metrics and key performance indicators as a by-product. As a result, monitoring and reporting are provided 'out of the box'. These metrics will provide the basis for ensuring service levels are known and managed, and will facilitate successive improvements.

The IQBG Team for the Adams County project will be onsite and work side-by-side with the Adams County team to install and configure the solution. Using this approach IQBG will be able to meet the 60-day implementation requirement and at the same time provide knowledge transfer to the Adams County team members.

In addition to unmatched speed to deployment, Assure offers integration with OpenText eDocs that is proven and verifiable through references – please see our References in Section 6 related to the solution provided to El Paso County, Colorado as a verification of the OpenText Assure product set being integrated with the EPAS document management solution built on OpenText eDocs (formerly Hummingbird). Using the solution and approach

proposed by IQBG, all documents associated with Cases will be stored in the central repository and accessible through the Case Management System.

3.1   IQBG Implementation Approach

The Assure implementation approach follows the proven OpenText five-step methodology (see our references in Section 6). This methodology will guide the project from planning and initiation, all the way through to post-deployment support and ongoing process improvement.

FIGURE 3.1-1. IMPLEMENTATION METHODOLOGY

The Project Review phase is brief, and focuses on defining and setting goals and expectations for the project. After team introductions and a review of the overall project, the team moves quickly into the Preparation phase.

Preparation, as the name suggests, involves a solution demonstration and review, preparation and verification of the required infrastructure and resources, and final sign-off of the scope of the solution to be implemented. Scope will be focused on how an Out of the Box (OOTB) implementation can meet the case management needs.

Once scope sign-off has been completed, the project will move to the Technical Services phase. This is an iterative phase that includes installation and configuration of the baseline solution and development of required integrations, implementation of security, user management and minor customization of the baseline. Specific scope and module mapping will occur and be confirmed during the project preparation phase.

The system will allow for the designation of a "case lifecycle". Distinct status codes would be identified and used to track cases in the various stages of its life. Business rules will determine the definition of the life cycle and are flexible enough for status to be either rigid and required or flexible and optional. For example, if a case is "Closed", it may be reopened if this is a necessary business scenario. Assure offers the ability to insert custom tasks dynamically in order to provide the flexibility sometimes needed for an ad-hoc case workflow as identified in the Adams County.

Business rules will regulate changes in status to enforce data integrity. As an example, it is possible to make certain data optional in one status but required to progress into another.

Assure will also support workflows that leverage web services of external systems. The implication of this is that tasks like benefits eligibility redetermination can be completed by a user working a case automatically if a web service is available.

Role based access to the system is supported in Assure. Service center representatives can have one set of functions and capabilities available while managers have another based on role. A hierarchical relationship where manager rights inherit all subordinates rights can be established so that managers can be allowed to open, modify, and reassign cases of their team members. The business rules collected during requirements analysis will dictate what functions and capabilities should be added and how they will be organized by role.

The Production phase includes all activities necessary to get the solution in a state of production readiness. The decision on whether to deploy into production or pursue additional iterations is a business decision that will be made by appropriate Adams County representatives. The Production phase includes system documentation, user training, final Production validation and sign-off, and Go-Live.

Once the system has been deployed to Production the project will progress to the Production Support phase. In this phase, OpenText will provide ongoing system support. In addition to this direct support, IQBG and Adams County will work to identify and scope ideas and requests for improvements to the deployed solution that will be included in Iteration 2.

3.2   Proposed Products / Services

3.2.1   OpenText Assure Overview

The OpenText Assure solution has unparalleled levels of flexibility within the case management arena. Assure's flexibility is a result of the OpenText BPM architecture on which it is developed. Customers adopting the Assure technology and approach to case management have been able to realize a new way of thinking; enabling global, dynamic, improvement-minded activities - with some of our largest, most complex customers (managing upwards of 4,500 agents and throughputs exceeding 10 million transactions a year) achieving significant cost savings.

The OpenText Assure platform will enable Adams County to become more efficient at performing and delivering service and support related functions while protecting its already made investments by effectively integrating with existing technology platforms and consuming data from existing data repositories to provide a more consistent, automated, and stable level of service across the County, the shareholder organizations, and third party providers.

The OpenText Assure solution has a process driven ethos at its core. This process and procedure driven nature provides structure, auditability and governance to all areas of case management to ensure compliance is enforced throughout. Assure has the ability to drive behavior, ensure compliance, and deliver more effective working practices through process alignment and adherence. This will enable the County to significantly enhance their customer experience and further promote the operations department as a proactive, responsive, customer centric driven entity.

OpenText Assure supports an innovative approach to providing best of breed case management in a global market. Rather than the application driven, hard coded approach that many other vendors in the industry have adopted, Assure has embraced business technology in the form of OpenText BPM and applied the technology to real IT needs: this provides the processes, systems and frameworks that enable organizations to better support their customers and end users, and to continually improve their service offering.

The OpenText Assure approach exceeds Adams County's objectives - to provide a scalable, resilient, automated and cost effective case management platform to assist the organization in delivering focused outcomes while significantly contributing toward mutual cost reductions, simplicity of system maintenance and bridging the integration gap between platforms and entities. And, it does so through a single interface for the County to interact with participants and partner organizations, with a one-stop operational dashboard that leverages existing infrastructure, applications and processes to deliver truly world class levels of service.

3.3   Proposed Project Plan

In preparation for the project, and to support our proposed pricing, the IQBG team has developed a detailed project plan that includes resource assignments that has been appropriately leveled. The Gantt chart below provides a high-level view of the project plan being proposed for completion of the Adams County Case Management requirements within the timeframe required. During the initiation phase of the project, this plan would be critiqued, refined and base-lined in collaboration with the Adams County team and Project Manager.

FIGURE 3.3-1. PROPOSED PROJECT PLAN
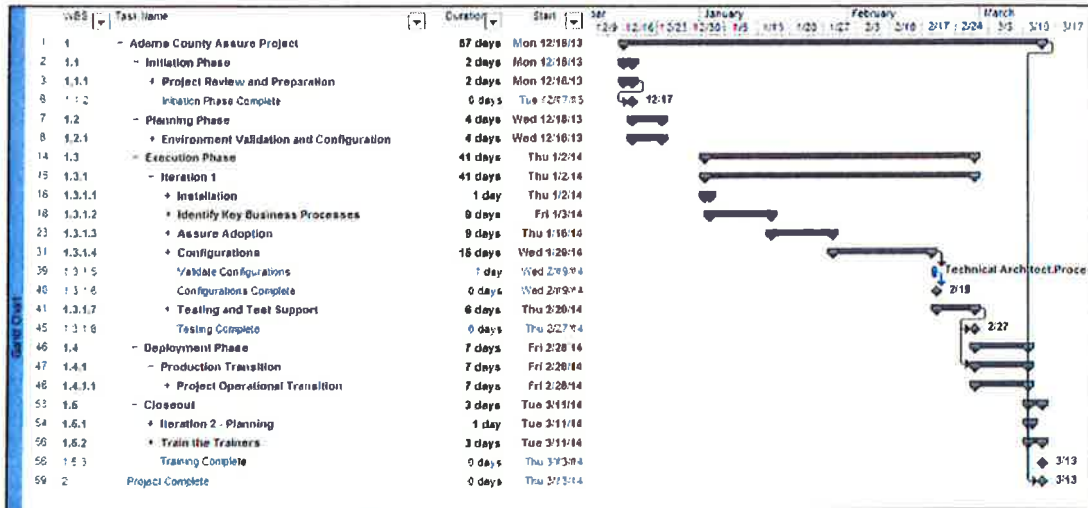
3.4   Fee Schedule

ATTACHMENT A
FEE SCHEDULE

The Offeror is responsible for all labor, supplies and materials to perform the services as identified in the scope of services. Offeror's fees as detailed below shall be firm through the entire term of the awarded agreement.

1   Implementation Services

Discipline	Number of Hours	Hourly Rate	Total
Project Manager	230	$ 175	$ 40,250
Process Consultant	174	175	30,450
Senior Technical Consultant	230	175	40,250
Staff Consultant	104	150	15,600
Transition Manager	162	225	36,450
Technical Architect	176	225	39,600
10% Discount on Services			-20,260
Sub Total			$ 182,340

2   Software

	Licenses	Unit Cost	Total
Assure Work Center (named users)	200	$ 800	$ 160,000
Assure Work Center (anonymous users)	1000	14	13,500
MBPM Integration for eDocs	1	6,500	6,500
Sub Total			$ 180,000

3   Provide Training Courses onsite at the County for three (3) employees

Discipline	Number of Hours	Hourly Rate	Total
Training Coordinator	24	$ 150	$ 3,600
Sub Total			$ 3,600

	Number of Years	Annual Rate	
4 Maintenance Warranty for three (3) years	3	$ 36,000	$ 108,000
Sub Total			$ 108,000

Total Services (1+3)	$	185,940
Total Software (2)		180,000
Total Maintenance(4)		108,000
Grand Total	$	473,940

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Use or disclosure of data contained on this sheet is
subject to restrictions on the title page of this proposal.

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3.4.1 Terms and Conditions

Terms and conditions are for a thirty-six (36) month service agreement including scope of work for annual preventative maintenance agreement.

Fees to not include business and travel expenses. Expenses are billed in accordance with GSA schedules and are not expected to exceed 15% of total budget.

4.0 References

Reference #1: El Paso County, Colorado

El Paso County Service Oriented Architecture (SOA) Business Process Management Solution

POP:	2006 - 2007
POC:	Cheryl Beier, Project Manager cherylbeier@elpasoco.com / (719) 520-6341

Description of Services Provided: El Paso County had been in the process of revamping its IT infrastructure to evolve its business into a standards environment. The county's philosophy was to implement new and improved systems that would be standard platforms across the county and integrated together in order to be accessed by every employee in every department from their desktop. Part of this plan is to tie the county's disparate systems together into one Service Oriented Architecture (SOA) to make sure it could reach its ultimate goal of providing great service and flexibility to its citizens and the County. With over 2,000 employees, the county has been running its operations manually and many of its critical processes have become inefficient and unproductive. These manual processes lacked a means for employees to track status and manage critical information.

The first service-enabled process that El Paso is deploying as part of its path to a complete service-oriented architecture is a very cumbersome, frustrating process – the Agenda Management process. This process is used by the Board of County Commissioners (BoCC) to review and approve items submitted by county departments and offices for its citizens and determine what will be discussed during its board committee meetings that are held bi-weekly. The process has been managed using paper which led to a lack of control and insight into where things were in the approval process. The process was labor and time intensive, and the inefficiencies in the process often times became very costly to the county especially when dealing with critical contract approvals.

By selecting Metastorm as the BPM standard across the county, El Paso will be able to automate endless manual processes and further streamline its operations, while helping to create a business-driven roadmap for achieving its SOA strategy. With Metastorm BPM all users involved in the agenda management process are connected and automatically notified when items (with backup) need to be reviewed so that there is collective accountability for the overall process.

The county sees its relationship with Metastorm as very long term as they plan to continue to leverage the software and continuously automate manual processes. El Paso County has positioned Metastorm BPM at the core of its SOA plan and will be helping the county realize more business value from service enablement.

Metastorm also automated the county's Permitting process – the procedure that manages requests for approval from developers for construction permits. A very cumbersome process, the county is expected to reduce processing times by streamlining procedures, integrating Metastorm BPM with its GIS system, and ultimately making it pay off for county developers who pay fees for this service.

Reference #2: Social Security Administration

National Investigative Case Management System (NICMS)

POP:	March, 2005
POC:	Gary Czarnecki 6401 Security Boulevard, Room 3-ME-4, Baltimore, MD 21235

	Gary.czarnecki@ssa.gov / (410) 965-2777

Description of Services Provided: OIG is currently using OpenText Assure software suite as the basis for its National Investigative Case Management System (NICMS). The NICMS is used by SSA to track detailed information pertaining to allegations and cases of fraud, waste and abuse in SSA programs. NICMS is used by approximately 500 OIG personnel to create and store records/files, obtain queries, perform case analysis, and generate reports from a centralized database containing investigative information. NICMS was developed in the fall of 2004 and the agency reports it had OpenText MBPM deployed in record time.

NICMS is comprised of approximately fifteen different processes that were automated using OpenText Assure. It documents OIG review of allegations and complaints concerning SSA programs and operations; aids in civil and criminal prosecutions, civil monetary penalty actions, and other litigation relating to OIG investigations; tracks investigative and litigation activities; documents the activities which were the subject of investigations; facilitates the reporting of results of OIG investigations to other SSA components for their use in operating and evaluating SSA programs, including administrative sanction proceedings; and serves as a repository and source for information necessary to fulfill statutory reporting requirements.

OIG has been able to increase the productivity of its investigative and legal staff which has led to a decrease in processing times. OpenText Assure has also enabled OIG to implement more discipline, structure and accountability while at the same time increasing operational efficiency.

Reference #3: Federal Bureau of Investigation

The Enterprise Process Automation System (EPAS)

POP:	March, 2009
POC:	Chris Kim
	935 Pennsylvania Ave NW, Washington, DC 20535
	Christopher.kim2@ic.fbi.gov / (202) 324-2732

Description of Services Provided: This project is currently operational and in production and has the following functionalities; Stakeholder management, Case management, Event management, Document management, Analytics and reporting, and Resource management. The implementation covered multiple business units using a single instance of the OpenText Solution. The project implementation includes integration with other applications and custom in-house legacy applications.

The Enterprise Process Automation System (EPAS) project implemented a case management system on the FBINET to serve as a standard for automated business processes. As part of a major initiative by the Director's Office, the Resource Planning Office (RPO) and the Business Process Management Unit (BPMU), which is the EPAS system owner, was tasked with deploying the EPAS project to host automated business processes as they were developed and deployed by both the RPO and other Divisions.

EPAS replaced out-dated manual work processes and stand-alone spreadsheets and databases with an efficient, cohesive, highly automated information sharing system. The enhanced capabilities allowed the FBI to reduce risk to people, information, operations, equipment, and facilities, and to share selected information within the FBI. These applications supported the FBI's administrative operations including the management of its human resources and payroll functions, hiring, and security.

The EPAS system included data obtained directly from the individual, the individual's supervisor, the National Finance Center (NFC), the Bureau Personnel Management System (BPMS), the Financial Management System (FMS) or from background investigation interviews. EPAS serves a community of approximately 32,000 FBI employees, along with 20,000 plus contractors, and applicants. Access is limited to FBI personnel and is restricted based on area of purview.

Reference #4: Department of Justice

Office of the Federal Detention Trustee (OFDT), eDesignate

POP:	March 2006
POC:	Shannon Brown 241 18th St S, Arlington, VA 22202 shannon.brown@usdoj.gov / (202) 616-9076

Description of Services Provided: This project is currently operational and in production and has the following functionalities; Stakeholder management, Case management, Event management, Document management, Analytics and reporting, and Resource management.
The implementation covered multiple business units using a single instance of the OpenText Solution.

Using OpenText MBPM as the foundation for the eDesignate system, OFDT has successfully developed a streamlined business process that incorporates a more efficient and effective means of submitting, monitoring, communicating, and resolving designation cases between the Courts, the USMS, and the BOP.

5.0 W-9

A W-9 form shall be completed and returned with proposal.

6.0 Requirements

The IQBG Team has reviewed the requirements of the Adams County RFP and has validated that our proposed plan and approach meets all requirements.

Requirement	Yes/No	Comments
Business Process Management and Workflow (Reference Attachment B at the end of this document).		
There must be a mechanism for starting a workflow process from outside the application.	Yes	Process triggers can be an external web form submission, email, a file in a specific location, web service invocation, etc.
Users must be able to dynamically add steps to a workflow process.	Yes	Adhoc tasks/actions can be added to existing workflows.
Units of work or tasks from defined workflow process should enter a queue where they can be pushed to or pulled by the appropriate workers. Managers should be able to reassign work in the queue as necessary. The system should determine these workers based on certain configurable attributes.	Yes	Supported in several ways, but very appropriately through the use of groups and roles, and Assure business rules, tasks can be assigned to multiple, appropriate workers and also reassigned as appropriate by staff recognized as Managers based on system attributes.
The two main higher level business processes are client intake where applications for benefits are initiated and ongoing client management involving the redetermination of benefit eligibility.	Yes	The solution proposed will support both the client intake and ongoing client management functions described in the Adams proposal and typical of Case Management solutions.
The system must integrate with Open Text eDocs 5.3.1 as the document repository for the system. That is where all the case documents are to be stored.	Yes	The Assure product, an OpenText solution as well, will integrate with the eDocs 5.3.1 document repository to make case documents readily available through the Case Management application.
Users must be able to upload documents and associate with a case.	Yes	Users will be able to support all documents and document types including email and associate them with the appropriate Case.
Case documents added to the system should be searchable and available for retrieval via native eDocs functionality.	Yes	The integration provided between Assure and eDocs supports search and retrieval via native eDocs functionality.
Reporting		
Due dates and time spent on tasks should be tracked.	Yes	Supported. Due Dates, SLAs, events and escalations are supported.
There should be a dashboard of key performance indicators that are being tracked by the system.	Yes	Support for dashboards/reports across several dimensions of process data is supported.
Users should be able to get a big picture overview and be able to drill down further.	Yes	Users can view summary status information, and be able to drill down into specific process instances.
The reporting should incorporate currently available staff with existing workload so	Yes	Reporting to provide workload analysis,

Requirement	Yes/No	Comments
that projections can be made and work can be shifted as needed.		projections, and adjustments based on projections is supported.
■ An audit trail/history of the work done on a case should be available.	Yes	A complete audit trail on actions taken to support ongoing case work is supported.
User Interface		
■ The users should be able to enter case notes.	Yes	The solution supports the ability of users to enter and capture case notes.
■ There should be a way to track correspondence with the client.	Yes	Supported. Emails exchanges with customers/clients can be tracked within the context of a case.
■ The user interface should provide a view where all the tasks, notes, document search and retrieval functions for a given case are shown.	Yes	The user interface proposed supports a complete view of all tasks, notes, document search and retrieval functions for the case that is in context.
■ The users should be able to see all of their tasks/workload with visual cues ranking time sensitive work.	Yes	Red/Yellow/Green type status indicators are available. Displays can be further configured to change color, or alert users of upcoming deadlines.
■ Users should be able to quickly retrieve case documents and display within the applications document viewer.	Yes	Users will be able to quickly retrieve and display case documents within the applications document viewer.
■ A browser based client interface is preferred over a thick client.	Yes	Supported. The platform only uses browser based interfaces for process and tasks management.
Software Architecture		
■ The software system should favor configuration over extensive customizations.	Yes	Out of the box support for several standard processes greatly reduces the need for heavy customizations.
■ Integration with Active Directory is preferred for maintaining system users.	Yes	Active Directory integration is fully supported.
■ Role based security that is customizable is preferred.	Yes	The proposed solution supports role based security and IQBG considers the role based approach to be best practice.
■ The availability of the different modules in the system should be based on the user roles.	Yes	Availability to both content and function will be based on user roles..
Offeror Services		
■ The County will designate staff members as trainers whom will need to be trained on the use of the case management system.	Yes	Supported.
■ The County IT Department will work closely with the Offeror during the development and configuration of the case management system. The purpose is twofold: to help limit implementation hours and to make sure the IT staff is able to maintain and configure the case management system when the implementation is	Yes	Supported. It is understood that our implementation team and Adams County will collaborate together during the development and configuration of the solution.

Requirement	Yes/No	Comments
completed.		
▪ The implementation should be complete within sixty (60) days of the notice to proceed project kickoff.	Yes	Supported.
▪ The Offeror should provide system support for one (1) month after the production implementation is complete.	Yes	This is included in the IQBG/Open Text solution proposed.
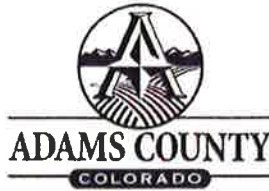
ADDENDUM OF SOLICITATION

SOLICITATION NUMBER: RFP 2013.232
SOLICITATION DATE: Friday, October 18, 2013
DESCRIPTION: **Adams County Case Management System**
Human Services Department
ADDENDUM NUMBER: **ONE (1)**
ADDENDUM DATE: November 7, 2013

The hour and date specified for receipt of RFP 2013.232 [ ] is [X] is not extended to the following new hour and date:
The above-numbered solicitation is amended as set forth below. Offerors must acknowledge receipt of this addendum prior to the hour and date specified in the solicitation or as amended by signing this form below or by acknowledging receipt of this addendum on each copy of the proposal submitted. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF PROPOSAL PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR PROPOSAL. If by virtue of this addendum you desire to change a proposal already submitted, such change may be made by letter, provided the letter makes reference to the solicitation and this addendum, and is received prior to the hour and date specified.

DESCRIPTION OF ADDENDUM:

A.   This Addendum is issued to provide answers to questions received for RFP 2013.232 on/or before Thursday, October 24, 2013, at the end of this page.

B.   Except as provided herein, all terms and conditions of the solicitation remain unchanged and in full force and effect.

Purchasing Division

ACKNOWLEDGEMENT:

(Signature/Date)

Michael D. Beck, President & CEO

(Name and Title)

IQ Business Group, Inc.

(Company Name)

1410 Spring Hill Road, 4th Floor, McLean, VA 22102

(Address)

cc: RFP 2013.232

Q1: Pg 1 – Para 4.5 Format – the paragraph states that five hardcopies of the proposal have to be submitted. Should one hardcopy be an original, with the other 4 marked as copies, or should all 5 be originals (signature in blue ink)?

R1: The Section reads as: <u>Format</u>. Offeror must submit sealed proposal in <u>**one (1) original CD as a.pdf file**</u> and five (5) hard<u>copies</u>. Proposal should not exceed **fifteen (15)** pages excluding the RFP required pages submitted only on single sided, single column typed 8.5" x 11"size. Brochures or other supportive documents may be included with the proposal narrative.

Q2: Attachment B – pg 1 -- the flowchart refers to client sending paperwork via PEAK. What is the functionality included in PEAK?

R2: **Peak is an online service for Coloradoans to screen and apply for medical, food, and cash assistance programs. Adams County is able to log into the PEAK system to view and download client applications in PDF format.**

Q3: Attachment B – pg 1 – the following acronyms are used: What do they signify?
R3: RRR - **Redetermination/Recertification**
MSR - **Monthly Status Report**

Q4: Attachment B – pg 1 -- the flowchart refers to the question "Can Navigator assist?" What is the functionality of Navigator?

R4: **The navigator does initial intake with clients who walk or call in. They answer basic questions that clients have about our services, accept applications for public assistance programs, schedule client for appointments, check clients in for appointments and make some changes to clients' records such as address changes.**

Q5: Section 10.1 – Background – CBMS case files in paper format are currently being scanned and added to the new DM system.

Q.5.1. Will case data need to be sent by CBMS to the new Case Management System (CMS)?
R: **The State of Colorado currently allows Adams County read only access to a copy the CBMS database. Many of our systems rely on nightly data pulls from this database. The new CMS will be able to access this data.**

Q.5.2. Will client data need to be sent by CBMS to the new Case Management System (CMS)?
R: **The State of Colorado currently allows Adams County read only access to a copy the CBMS database. Many of our systems rely on nightly data pulls from this database. The new CMS will be able to access this data.**

Q.5.3. Will case data (status, etc.) need to be sent by the new CMS to CBMS?
R: **The State of Colorado does not currently allow any type of data upload to CBMS. This is functionality that may be provided in the future.**

Q.5.4. Will client data (changes, etc.) need to be sent by the new CMS to CBMS?

R: The State of Colorado does not currently allow any type of data upload to CBMS. This is functionality that may be provided in the future.

Q.5.5. What is envisaged by the County for the mechanics and protocol of this data exchange between CBMS and the new CMS?

R: Our current system runs SSIS packages nightly to extract, transform and load data from the State's Oracle database to our SQL Server databases.

Q.5.6. Will the document indexes be accessible by the new CMS for search and retrieval?

R: The document indexes are stored in our eDocs database and would be accessible by the new CMS.

Q6:   Section 10.2 – Scope of Services – the two main higher level business processes are client intake …. and client management involving redetermination of benefit eligibility. Should these processes also be conducted in the new CMS (with data changes being sent to CBMS when needed?

R6:   The new CMS should address these higher level processes. The purpose of the CMS is to help the County's 200 case workers better manage and track the business processes involved with administering CBMS. The system is meant to augment not supplant CBMS. Currently, there is no method to update CBMS other than manually via the CBMS website.

Q7:   Pg 14 – Attachment A – Fee Schedule – hourly rates and typical number of hours. For turnkey projects such as this where some customization of a COTS (commercial-off-the-shelf) product is needed, we find that we typically need the gamut of IT project skills during the project and even with change orders. We have been quoting a fixed price for the project depending on the defined scope of work, and a bundled rate for all skills for change orders. This facilitates the client's budgeting, and record keeping. Would this approach, or even a bundled hourly rate with a "not to exceed" total cost be acceptable to the County?

R7:   Breaking down the project into phases or scopes of work is fine. The County would still like to see a breakdown of rates by discipline, unless there is only a single rate.

Q8:   Does the County use MS Exchange and MS Outlook for eMail?

R8:   Yes

Q9:   Does the County have MS SQL Server as a database tool?

R9:   Yes

Q10: Does Adams County have the hardware in place that will host the solution?

R10: The servers that will host the solution will be virtual. The virtualization hardware is already in place.

Q12: In order to support OpenText Assure integration, eDOCS 5.3.1 will have to be updated to Patch 4 with the latest hot-fixes. This is a cumulative update that can be applied to top of 5.3.1 P1 or greater. How many servers (dev/test/etc) does Adams County have with eDOCS that would require this update? How many client machines client machines will the patch affect (if applicable)?

R12: There is currently one eDocs fusion server in production with approximately two hundred client machines. Development servers have yet to be created.

Q13: With reference to our question #2, does Adams County have any customizations to eDOCS that should be considered before an update to Patch 4?

R13: There are no customizations to the eDocs environment that would be affected by Patch 4.

Q14: The RFP states, "There must be a mechanism for starting a workflow process from outside the application." Can Adams County clarify what 'starting a workflow' means? In other words, does the [external] User have a need to simply start the workflow —or- is there a need to interact with the workflow?

R14: This is meant to refer to starting a workflow programmatically. Our production scan system should be able to start a workflow as specific document types are released into eDocs. Once this workflow is started it will be attended to and completed by the case workers.

Q15: The RFP states that a case may be opened, closed and acted upon many times during its lifetime. Can Adams County define 'lifetime'? Has a records management schedule been defined?

R15: There is currently no records management application in place. Implementation of a records management system is not within the scope of this project. Lifetime as used in this context refers to the fact that many of the clients we service receive benefits from birth to the time they die including burial benefits. The case would literally last the lifetime of the client and need to be accessed repeatedly.

Q16: The RFP states that, "The two main higher level business processes are client intake where applications for benefits are initiated and ongoing client management involving the re-determination of benefit eligibility." How do these higher-level processes affect the predefined workflow(s) outlined in Attachment B?

R16: Attachment B is a draft attempt at defining the higher level business processes of client intake and ongoing client management. They are incomplete in that there is no indication of automation vs. human intervention in the decision points. These were created as a starting point to facilitate the creation of a more complete workflow model.

Q17: The RFP states that, "Users should be able to enter case notes." Do all users have access to case notes? Has a role-based security matrix been defined?
R17: The role_based security matrix has not yet been thoroughly defined. The hierarchy is basically Supervisors > Lead Workers > Case Workers. We do also have some cases that are confidential that can only be seen by certain workers. With the exception of confidential cases all users would have access to the case notes.

Q18: The RFP states that, "The availability of the different modules in the system should be based on the user roles." Has a role-based security matrix been defined?

R8: The role based security matrix has not yet been thoroughly defined. The hierarchy is basically Supervisors > Lead Workers > Case Workers.

Q19: What Identity Management source does Adams County currently use? Active Directory? What version(s)?

R19: Active Directory 2003 Mixed Mode

Q20: Will any of the workflows be triggered by or use Office 2013 documents?
R20: Not in the immediate future as we have not yet rolled out Office 2013.

Q21: Does Adams County envision Mobility as future feature/functionality for the solution?

R21: Mobility is a current hot topic for the County. Though we do not have an immediate need for this application to support mobility this is something we would need to address in the future. Our current standard for mobile access to internal applications is to publish them through Citrix.

Q22: We understand that the two main higher level business processes to be supported by the new case management system are client intake and ongoing client case management. Are these business processes not currently supported within the CBMS eligibility system?

R22: The new CMS (case management system) should address these higher level processes. The purpose of the CMS is to help the County's 200 case workers better manage and track the business processes involved with administering CBMS. The system is meant to augment not supplant CBMS. CBMS provides an interface for the case workers to enter client data for the benefits application process. The County maintains the responsibility to manage the workflow involved with tracking the paper and electronic applications, interviewing clients and making sure clients have returned the necessary verification documents along with a host of other tasks.

Q23: Please confirm that the new Case Management System will not contain the business rules for eligibility screening and/or determination.

R23: The new Case Management System will not contain the business rules for eligibility screening and/or determination.

Q24: Does the new Case Management System need to interface with PEAK and/or CBMS?

R24: There will not need to be a direct interface with PEAK or CBMS.

Q25: Can the County please provide additional detail on the types and mix of roles that the 200 users of the system perform? For example, how many are supervisors? Are there specialized intake workers separate from case managers that support ongoing case management activities?

R25: The different roles in hierarchical order are Supervisors > Lead Workers > Case Workers. There would also need to be a System Administrator role. The case workers are moving to a generalist model and task based work system. Some of the tasks workers will perform require more experience with a certain program area necessitating the need for the workflow system to be able to differentiate the workers when assigning or displaying available tasks.

Q26: Does the Offeror need to propose the hardware and software infrastructure (ex. servers, DBMS) for the Case Management System, or will the County be providing these components of the system? If the County will be providing the hardware and software infrastructure, please provide details on the available hardware and software.

R26: The Offeror does not need to propose infrastructure. The majority of the County's server infrastructure is virtualized using VMware with various versions of Windows Server used for the server operating systems. These range from Windows Server 2003 to Window server 2012 R2. The County supports a number of database management systems with Oracle and SQL Server being the most prevalent.

Q27: Does the County have any technology standards with which the new Case Management System will need to comply with?

R27: The Case Management System should be HIPAA compliant.

Q28: Can the County please share its estimated budget (or range) for the Case Management System implementation project?

R28: The estimated budget for this project will be determined based on the responses we receive for the RFP.

Q29: What is meant by "dynamically" adding steps to a workflow process? Can you provide an example

R29: The designed workflows should be flexible and allow the participant/user to add additional steps if necessary. These steps could come from a predefined list or be created on the fly. An example would be a worker realizing that a certain case needs to have a form that is not normally used completed and signed by their supervisor. They should be able to add this to that cases workflow.

Q30: Integration with Open text eDocs 5.3.1. Is it required to update or change a document through the case management system? What search functions are required from the case management system? Can these be viewed as attachments to the case?

R30: Document type classifications in eDocs will be associated with a predefined set of index fields. The Case Management System should allow for documents to be added using these and the eDocs repository should be thought of as part of the Case Management System.

Q31: Integration with Active Directory - What Active Directory functions would you like to perform? How do you envision it working?

R31: Active Directory should act as the user store and provide the method of user authentication. The case management system would most likely need to carry additional information about the users to provide the level of granularity needed to target certain tasks for workers with specific skills.

Q32: Are you open to a phased approach or is the 60 day delivery a hard requirement?

R32: The County understands that the process lifecycle utilized with today's BPM (Business Process Management) software involves iterative phasing with optimizations made to continuously improve the process. The case management system needs to be in production within the 60 days even if there are improvements and tweaks to the system continuing to happen past that.

Q33: Do you expect work to be performed on site?

R33: The work does not need to be performed on site though some site visits for work sessions and meetings will be necessary.

Q34: Reporting mentions - due dates and time spent on tasks. What information are you expecting the case management system to capture to enable this reporting?

R34: Certain tasks in the workflow processes will be time sensitive. These due dates may be set automatically by a rule or alternatively set by the user or manager. This will allow reporting and alerting of tasks coming due. Capturing the time tasks were assigned to a user and when the task was completed is important to determine productivity and bottlenecks. The users interactions with the system should be tracked. When the users log in and log out, the time and date a case note was written and the time and date a conversation with a client took place are a few examples of the information that should be tracked.

Q35: What data, if any would you expect to be migrated? What would the approx volumes be?

R35: The State of Colorado currently allows Adams County read only access to a copy the CBMS database. Many of our systems rely on nightly data pulls from this database. The new case management system will be able to access this data, but there will not be a need for a large data migration. Any additional database work required can be performed by the County IT department.

Q36: How many cases per day, week, month? and how many different case types?

R36: There are about 4500 cases a month. Cases are composed of one or more clients who have applied for benefits from one or more of the available Colorado Department of Human Services programs. Cases do not have a specific type. The case file holds all the documentation and information surrounding a group of clients applying for or receiving benefits through CBMS. Multiple benefits programs are represented under one case.

Q37: I know the RFP mentions 200 case workers? How many total users would you expect to have   and what are the different roles?

R37: The different roles in hierarchical order are Supervisors > Lead Workers > Case Workers. There would also need to be a System Administrator role. The total number is approximately 200 users.

Q38: Do you need to control access to information by user type? Should certain users can only have access to certain data or cases?

R38: Users would be assigned to a role and that role should determine access to the various parts of the application. For example, only managers would be able to view the key performance indicators of the case workers. Certain cases are flagged as confidential and only certain employees can view them.

Q39: In addition to end user training (via train the trainer) would you require training for a system administrator to manage the system and users moving forward?

R39: There is not a need for special training for a system administrator. The IT department will fill this role and should be well versed in the application after working closely with the offeror during configuration and implementation of the system.

OFFEROR'S CERTIFICATION OF COMPLIANCE

Pursuant to Colorado Revised Statute, § 8-17.5-101, *et.seq.*, as amended 5/13/08, as a prerequisite to entering into an agreemnt for services with Adams County, Colorado, the undersigned Offeror hereby certifies that at the time of this certification, Offeror does not knowingly employ or contract with an illegal alien who will perform work under the awarded agreement for services and that the Offeror will participate in the E-Verify Program or Department program, as those terms are defined in C.R.S. § 8-17.5-101, *et. seq.* in order to confirm the employment eligibility of all employees who are newly hired for employment to perform work under the awarded agreement.

OFFEROR:

IQ Business Group, Inc.
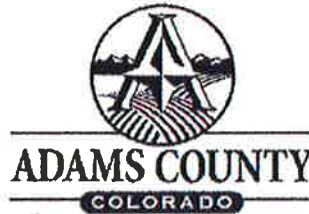_____
Company Name

11/18/13
_____
Date

Michael D. Beck
_____
Name (Print or Type)

_____
Signature

President/CEO
_____
Title

Note: Registration for the E-Verify Program can be completed at: https://www.vis-dhs.com\employerregistration. It is recommended that employers review the sample "memorandum of understanding" available at the website prior to registering.
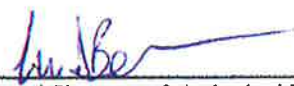
ADAMS COUNTY
COLORADO

REQUEST FOR PROPOSAL
2013.142
FEDERAL LOBBYING SERVICES

<u>**OFFEROR'S STATEMENT/SIGNATURE PAGE**</u>

I have read and fully understand all the special conditions herein set forth in the foregoing paragraphs, and by my signature set forth hereunder, I hereby agree to comply with all said special conditions as stated or implied. In consideration of the above statement, the following proposal is hereby submitted.

WE, THE UNDERSIGNED, HEREBY ACKNOWLEDGE RECEIPT OF

Addenda # ___1___ through Addenda # ___1___
(If None, Please write NONE)

IQ Business Group, Inc.	11/18/13
Company Name	Date
1410 Spring Hill Road, 4th Floor	
Address	Name and Signature of Authorized Person
McLean, VA 22102	Michael D. Beck
City, State, Zip Code	Printed Name
	President/CEO
County	Title
301-335-1750	678-302-4415
Telephone	Fax
mbeck@iqbginc.com	
E-mail Address	

EXHIBIT A
(All Documents following this page of the Agreement)

Exhibit:

1. Adams County RFP 2013.232 Specifications and Statement of Services Solicitation

The remainder of this page left blank intentionally

ADAMS COUNTY FORMAL REQUEST FOR PROPOSAL
2013.232

Adams County Case Management System
Human Services Department

All Documents and Addendums related to this RFP
will be posted on the Rocky Mountain Bid System at:
http://www.rockymountainbidsystem.com/Bids/ViewOpenSolicitations.asp

RFP Issuance Date: October 18, 2013

Written questions regarding this RFP will be accepted through
October 24, 2013, by 2:00 p.m.

RFP Opening Date: November 18, 2013
Time: 4:00 p.m.

Location: Adams County Government Center
Purchasing Division
4430 South Adams County Parkway
Brighton, CO 80601

ADAMS COUNTY
COLORADO

GENERAL INSTRUCTIONS

1. The Adams County Board of Commissioners by and through its Purchasing Division of Finance is seeking proposals for the purchase of a case management system for Adams County Government Human Service Department.

2. **All documents and addendums related to this RFP will be posted on the Rocky Mountain Bid System at:**
   http://www.rockymountainbidsystem.com/Bids/ViewOpenSolicitations.asp

   2.1 Vendors must register with this service to receive these documents.
   2.2 This service is offered free or with an annual fee for automatic notification services.

3. Written questions relating to RFP 2013.232 must be reduced to writing, and sent to the County's Purchasing Division of Finance to the attention of the Purchasing Agent by e-mail at hcasteel@adcogov.org until the close of business on or before, Thursday, October 24, 2013, by 2:00 p.m.

4. **Proposals**
   4.1. Sealed proposals for consideration will be received at the office of the Purchasing Division of Finance at the Adams County Government Center, 4430 South Adams County Parkway, Fourth Floor, Brighton Colorado 80601, up to 4:00 p.m., Monday, November 18, 2013.

   4.2. The RFP opening time shall be according to the County receptionist's clock on the first floor, at this time only the names of the Offerors submitting proposals will be read out loud.

   4.3. Proposals may be mailed or delivered in person, and **must be** in a sealed envelope clearly labeled with the submitting Company's Name, RFP number, the project name, and time of the RFP opening.

   4.4. No proposal will be accepted after the time and date established, per section 4.1 above, except by written addenda.

   4.5. **Format**. Offeror must submit sealed proposal in **one (1) original CD as a .pdf file** and five (5) hardcopies. Proposal should not exceed **fifteen (15)** pages excluding the RFP required pages submitted only on single sided, single column typed 8.5" x 11"size. Brochures or other supportive documents may be included with the proposal narrative.

   4.6. The two (2) required signature pages at the end of this document **"OFFEROR'S CERTIFICATION OF COMPLIANCE"** Pursuant to Colorado Revised Statute (C.R.S.), § 8-17.5-101, *et. seq.*, as amended 5/13/08 and the **"OFFEROR'S SIGNATURE PAGE"** acknowledging the receipt of addendum(s), if applicable, must be signed and included as part of the proposal packet.

4.7. Proposal may not be withdrawn after date and hour set for closing. Failure to enter into an agreement or honor an issued purchase order will be cause for removal of Offeror's name from the County's Vendor's List for a period of twelve (12) months from the date of this RFP opening.

4.8. The County reserves the right to short list from the submitting Offerors and conduct interviews.

4.9. In submitting the proposal, the Offeror agrees that acceptance of any or all proposals by the Purchasing Division of Finance within a reasonable time or period constitutes an agreement. No delivery shall become due or be accepted unless a purchase order shall first have been issued by the Purchasing Division.

4.10. The County assumes no responsibility for late deliveries of mail on behalf of the United States Post Office or any other delivery system.

4.11. The County assumes no responsibility for proposals being either opened early or improperly routed if the envelope is not clearly marked on the outside with the RFP number and solicitation name.

4.12. In the event of a situation severe enough to cause the Adams County Board of Commissioners to close The County Offices for any reason, the Purchasing Manager has the prerogative of rescheduling the RFP opening time and date. No proposal will be considered above all other proposals by having met the RFP opening time and date requirements to the exclusion of those who were unable to present their proposal due to a situation severe enough to cause the Commissioners to close the County Offices.

4.13. Proposals must be furnished in the format described in Section 4.5 above. Failure to submit proposal in the format described in Section 4.5 above may be cause for rejection of the proposal. Proposals must be furnished exclusive of taxes.

4.14. No award will be made to any person, firm or corporation that is in arrears upon any obligation to the County.

4.15. If submitting a joint venture proposal or a proposal involving a partnership arrangement, articles of partnership stating each partner's responsibilities shall be furnished and submitted with the proposal.

4.16. The County reserves the right to waive any irregularities or informalities, and the right to accept or reject any and all proposals, including but not limited to:
    4.16.1. Any Proposal which does not meet bonding requirements, or,
    4.16.2. Proposals which do not furnish the quality, or,
    4.16.3. Offer the availability of materials, equipment or services as required by the specifications, description or scope of services, or,
    4.16.4. Proposals from Offerors who lack experience or financial responsibility, or,
    4.16.5. Proposals which are not made to form.

4.17. The Board of County Commissioners may rescind the award of any proposal within one (1) week thereof or at its next regularly scheduled meeting; whichever is later, when the public interest will be served thereby.

4.18. Issuance of this solicitation does not commit the County to award any Agreement or to procure or Agreement for any equipment, materials or services.

4.19. If a formal Agreement is required, the Offeror agrees and understands a Notice of Award does not constitute an Agreement or create a property interest of any nature until an Agreement is signed by the Awardee and the Board of County Commissioners and/or their authorized designee.

4.20. Only sealed proposals received by the Purchasing Division of Finance will be accepted; proposals submitted telephone, E-mail, or facsimile machines are not acceptable.

5. Adams County is an equal opportunity employer.

6. The County ensures that Disadvantaged Business Enterprises will be afforded full opportunity to submit a proposal in response to all invitations and will not be discriminated against on the grounds of race, color, national origin, age, gender, or disability in consideration for an award.

7. **INSURANCE:** The Offeror agrees to maintain insurance of the following types and amounts:

   7.1. Commercial General Liability Insurance: to include products liability, completed operations, contractual, broad form property damage and personal injury.
   - 7.1.1. Each Occurrence $1,000,000
   - 7.1.2. General Aggregate $2,000,000

   7.2. Comprehensive Automobile Liability Insurance: to include all motor vehicles owned, hired, leased, or borrowed.
   - 7.2.1. Bodily Injury/Property Damage $1,000,000 (each accident)
   - 7.2.2. Personal Injury Protection Per Colorado Statutes

   7.3. Workers' Compensation Insurance: Per Colorado Statutes

   7.4. Professional Liability Insurance: to include coverage for damages or claims for damages arising out of the rendering, or failure to render, any professional services.
   - 7.4.1. Each Occurrence $1,000,000
   - 7.4.2. This insurance requirement applies only to Offeror who are performing services under this Agreement as professionals licensed under the laws of the State of Colorado, such as physicians, lawyers, engineers, nurses, mental health providers, and any other licensed professionals.

   7.5. The Offeror's commercial general liability, and comprehensive automobile liability insurance policies and/or certificates of insurance shall be issued to include Adams County as an "additional insured," and shall include the following provisions:

3

7.5.1. Underwriters shall have no right of recovery or subrogation against the County, it being the intent of the parties that the insurance policies so affected shall protect both parties and be primary coverage for any and all losses resulting from the actions or negligence of the Offeror.

7.5.2. The insurance companies issuing the policy or policies shall have no response against the County for payment of any premiums due or for any assessments under any form of any policy.

7.5.3. Any and all deductibles contained in any insurance policy shall be assumed by and at the sole risk of the Offeror.

7.6. All insurers of the Offeror must be licensed or approved to do business in the State of Colorado. Upon failure of the Offeror to furnish, deliver and/or maintain such insurance as provided herein, the Agreement, at the election of the County, may be immediately declared suspended, discontinued, or terminated. Failure of the Offeror in obtaining and/or maintaining any required insurance shall not relieve the Offeror from any liability under the Agreement, nor shall the insurance requirements be construed to conflict with the obligations of the Offeror concerning indemnification.

7.7. Each insurance policy herein required shall be endorsed to state that coverage shall not be suspended, voided, or canceled without thirty (30) days prior written notice by certified mail, return receipt requested, to the County.

7.8. At any time during the term of the Agreement, the County may require the Offeror to provide proof of the insurance coverage's or policies required under the Agreement.

7.9. The Offeror shall not commence work under the agreement until they have submitted to the County and received approval thereof, certificates of insurance showing that they have complied with the foregoing insurance.

7.10. All referenced insurance policies and/or certificates of insurance shall be issued to include Adams County as an "additional insured." The name of the RFP or project must appear on the certificate of insurance.

7.11. Underwriters shall have no right of recovery or subrogation against the County; it being the intent of the parties that the insurance policies so affected shall protect both parties and be primary coverage for any and all losses covered by the described insurance.

7.12. The clause entitled "Other Insurance Provisions" contained in any policy including the County as an additional insured shall not apply to the County.

7.13. The insurance companies issuing the policy or policies shall have no response against the County for payment of any premiums due or for any assessments under any form of any policy.

7.14. Any and all deductibles contained in any insurance policy shall be assumed by and at the sole risk of the Offeror.

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7.15. If any of the said policies shall be or at any time become unsatisfactory to the County as to form or substance, or if a company issuing any such policy shall be or at any time become unsatisfactory to the County, the Offeror shall promptly obtain a new policy, submit the same to the Purchasing Division Manager of Adams County for approval and thereafter submit a certificate of insurance as herein above provided. Upon failure of the Offeror to furnish, deliver and maintain such insurance as provided herein, the agreement, at the election of the County, may be immediately declared suspended, discontinued or terminated. Failure of the Offeror in obtaining and/or maintaining any required insurance shall not relieve the Offeror from any liability under the agreement, nor shall the insurance requirements be construed to conflict with the obligations of the Offeror concerning indemnification.

8. Offeror shall comply with the requirements of the Occupational Safety and Health Act (OSHA) and shall review and comply with the County's safety regulations while on any County property. Failure to comply with any applicable federal, state or local law, rule, or regulation shall give the County the right to terminate this agreement for cause.

9. **COMPLIANCE WITH C.R.S. § 8-17.5-101, ET. SEQ. AS AMENDED 5/13/08**: Pursuant to Colorado Revised Statute (C.R.S.), § 8-17.5-101, *et. seq.*, as amended 5/13/08, the Offeror shall meet the following requirements prior to signing the Agreement (purchase of service agreement) and for the duration thereof:

9.1. The Offeror shall certify participation in the E-Verify Program (the electronic employment verification program that is authorized in 8 U.S.C. § 1324a and jointly administered by the United States Department of Homeland Security and the Social Security Administration, or its successor program) or the Department Program (the employment verification program established by the Colorado Department of Labor and Employment pursuant to C.R.S. § 8-17.5-102(5)) on the attached certification.

9.2. The Offeror shall not knowingly employ or contract with an illegal alien to perform work under the purchase of service agreement.

9.3. The Offeror shall not enter into a contract with a subcontractor that fails to certify to the Offeror that the subcontractor shall not knowingly employ or contract with an illegal alien to perform work under the purchase of service agreement.

9.4. At the time of signing the purchase of service agreement, the Offeror has confirmed the employment eligibility of all employees who are newly hired for employment to perform work under the purchase of service agreement through participation in either the E-Verify Program or the Department Program.

9.5. The Offeror shall not use either the E-Verify Program or the Department Program procedures to undertake pre-employment screening of job applicants while the purchase of service agreement is being performed.

9.6. If Offeror obtains actual knowledge that a subcontractor performing work under purchase of service agreement knowingly employs or contracts with an illegal alien, the Offeror shall: notify the subcontractor and the County within three (3) days that the Offeror has actual knowledge that the subcontractor is employing or contracting with an illegal alien; and terminate the subcontract with the subcontractor if within three (3) days of receiving the notice required pursuant to the previous paragraph, the subcontractor does not stop employing or contracting with the illegal alien; except that the Offeror shall not terminate the contract with the subcontractor if during such three (3) days the subcontractor provides information to establish that the subcontractor has not knowingly employed or contracted with an illegal alien.

9.7. Offeror shall comply with any reasonable requests by the Department of Labor and Employment (the Department) made in the course of an investigation that the Department is undertaking pursuant to the authority established in C.R.S. § 8-17.5-102(5).

9.8. If Offeror violates this Section, of the Agreement, the County may terminate the Agreement for breach of contract. If the Agreement is so terminated, the Offeror shall be liable for actual and consequential damages to the County.

End General Information

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10. STATEMENT AND SCOPE OF SERVICES

10.1. Statement of Services:

The Adams County Board of County Commissioners (BOCC) by and through its Purchasing Division of Finance is seeking a highly qualified IT consulting firm who has successfully provided and implemented case management systems to government agencies. The firm will assist Adams County Colorado Government, (refer to hereafter as the "County"), Project Manager in implementing the case management software.

Background:

The County's Human Service Department is responsible for managing the Colorado Benefits Management System (CBMS) cases for the County. The primary responsibility is to assist clients with obtaining benefits for which they qualify. The County recently implemented a document management (DM) and image scanning solution. Kofax Capture 10 is the software used during scanning and eDocs 5.3.1 by OpenText is the DM solution. The CBMS case files in paper format are currently being scanned and added to the new DM system. The County is now looking to acquire a case management system to integrate with the DM/scan solution. The purpose of the case management system is to help the County's 200 case workers better manage and track the business processes involved with administering CBMS. The system is meant to augment not supplant CBMS. This new case management system will blend together document management, with both structured and unstructured work processes. It should represent the case as the core element in the system. All the data and documents stored in the system should relate to a case. The case may be opened, closed and acted upon many times over its lifetime. The case worker will make decisions concerning the case and will not always follow a predefined workflow process. They may need to add steps or tasks on the fly. The case may involve multiple persons from inside and outside the organization. The case file will contain customer communications, documents, reports, forms, emails, faxes and notes. These electronic documents should be stored securely in the County's eDocs system and should be instantly retrievable using simple searches from both the new system and our current eDocs system.

10.2. Scope of Services:

Business Process Management and Workflows (Reference **Attachment B** at the of this document).

- There must be a mechanism for starting a workflow process from outside the application.
- Users must be able to dynamically add steps to a workflow process.
- Units of work or tasks from defined workflow process should enter a queue where they can be pushed to or pulled by the appropriate workers. Managers should be able to reassign work in the queue as necessary. The system should determine these workers based on certain configurable attributes.
- The two main higher level business processes are client intake where applications for benefits are initiated and ongoing client management involving the redetermination of benefit eligibility.

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Document Management
- The system **must** integrate with Open Text eDocs 5.3.1 as the document repository for the system. That is where all the case documents are to be stored.
- Users must be able to upload documents and associate with a case.
- Case documents added to the system should be searchable and available for retrieval via native eDocs functionality.

Reporting
- Due dates and time spent on tasks should be tracked.
- There should be a dashboard of key performance indicators that are being tracked by the system.
- Users should be able to get a big picture overview and be able to drill down further.
- The reporting should incorporate currently available staff with existing workload so that projections can be made and work can be shifted as needed.
- An audit trail/history of the work done on a case should be available.

User Interface
- The users should be able to enter case notes.
- There should be a way to track correspondence with the client.
- The user interface should provide a view where all the tasks, notes, document search and retrieval functions for a given case are shown.
- The users should be able to see all of their tasks/workload with visual cues ranking time sensitive work.
- Users should be able to quickly retrieve case documents and display within the applications document viewer.
- A browser based client interface is preferred over a thick client.

Software Architecture
- The software system should favor configuration over extensive customizations.
- Integration with Active Directory is preferred for maintaining system users.
- Role based security that is customizable is preferred.
- The availability of the different modules in the system should be based on the user roles.

Offeror Services
- The County will designate staff members as trainers whom will need to be trained on the use of the case management system.
- The County IT Department will work closely with the Offeror during the development and configuration of the case management system. The purpose is twofold: to help limit implementation hours and to make sure the IT staff is able to maintain and configure the case management system when the implementation is completed.

- The implementation should be complete within sixty (60) days of the notice to proceed project kickoff.

- The Offeror should provide system support for one (1) month after the production implementation is complete.

11. FEE SCHEDULE AND PAYMENT:
11.1. The Offeror must submit fees for the line items identified on the **Fee Schedule (Attachment A)** to include all cost, if applicable.

11.2. The Offeror must submit incurred expenses monthly with supporting documents.

12. SCHEDULE AND HOURS OF WORK:
12.1. The Offeror must provide a work schedule for review by the Project Manager once the Agreement is executed and a notice to proceed (NTP) is issued. The County or the Project Manager will not be responsible for approving the Offeror's work schedule for any acceleration or delays.

12.2. The County's normal work hours at the site are from 8:00 a.m. to 4:30 p.m., Monday through Friday, excluding holidays.

13. TERM OF THE AGREEMENT:
13.1. Award of this solicitation will result in the establishment of a signed County Agreement for a ninety (90) calendar days from the date of the issuance of the notice to proceed (NTP).

14. CONTFLICT OF INTEREST:
14.1. The Offeror warrants that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of services being required under the solicitation.

15. INDEPENDENT OFFEROR:
15.1. Offeror shall perform its duties hereunder as an independent contractor and not as an employee. Neither Offeror nor any agent or employee of Offeror shall be deemed to be an agent or employee of the County. Offeror and its employees and agents are not entitled to unemployment insurance or workers compensation benefits through the County and the County shall not pay for or otherwise provide such coverage for Offeror or any of its agents or employees.

Unemployment insurance benefits will be available to Offeror and its employees and agents only if such coverage is made available by Offeror or a third party. Offeror shall pay when due all applicable employment taxes and income taxes and local head taxes incurred pursuant to the Agreement.

15.2. Offeror shall not have authorization, express or implied, to bind the County to any agreement, liability or understanding, except as expressly set forth in the agreement. Offeror shall **(a)** provide and keep in force workers' compensation and unemployment compensation insurance in the amounts required by law, **(b)**provide proof thereof when requested by the County, and **(c)** be solely responsible for its acts and those of its employees and agents.

16. NONDISCRIMINATION:

16.1. The Offeror shall not discriminate against any employee or qualified applicant for employment because of age, race, color, religion, marital status, disability, sex, or national origin. The Offeror agrees to post in conspicuous places, available to employees and applicants for employment, notices provided by the local public agency setting forth the provisions of this nondiscrimination clause. The County is an equal opportunity employer.

16.2. The Offeror will cause the foregoing provisions to be inserted in all subcontracts for any work covered by the Agreement, so that such provisions will be binding upon each subcontractor, provided that the foregoing provisions shall not apply to contracts or subcontracts for standard commercial supplies or raw materials.

17. INTELLECTUAL PROPERTY

17.1. If, Offeror infringes on a patent, copyright, trademark, trade secret or other intellectual property right while performing its obligations under the Agreement, Offeror shall, at the County's option **(a)** obtain for the County or Offeror the right to use such products and services; **(b)** replace any Goods, Services, or other product involved with non-infringing products or modify them so that they become non-infringing; or, **(c)** if neither of the foregoing alternatives are reasonably available, remove any infringing Goods, Services, or products and refund the price paid therefore to the County.

18. CONFIDENTIAL INFORMATION-COUNTY RECORDS

18.1. Offeror shall comply with the County's terms if it becomes privy to confidential information in connection with its performance hereunder. Confidential information includes, but is not necessarily limited to, any county records, personnel records, and information concerning individuals. Such information shall not include information required to be disclosed pursuant to the Colorado Open Records Act, CRS §24-72-101, et seq.

18.1.1. Confidentiality

Offeror shall keep all County records and information confidential at all times and comply with all laws and regulations concerning confidentiality of information. Any request or demand by a third party for County records and information in the possession of Offeror shall be immediately forwarded to County's principal representative.

18.1.2. Notification

Offeror shall notify its agent, employees, subcontractors and assignees who may come into contact with County records and confidential information that each is subject to the confidentiality requirements set forth herein, and shall provide each with a written explanation of such requirements before permitting them to access such records and information.

18.1.3. Use, Security, and Retention

Confidential information of any kind shall not be distributed or sold to any third party or used by Offeror or its agents in anyway, except as authorized by this Offeror approved in writing by the County. Offeror shall provide and maintain a secure environment that ensures confidentiality of all County records and other confidential information wherever located. Confidential information shall not be retained in any files or otherwise by Offeror or its agents, except as permitted in the Agreement or approved in writing by County.

18.1.4. Disclosure-Liability

Disclosure of County records or other confidential information by Offeror for any reason may because for legal action by third parties against Offeror, County or their respective agents. Offeror shall indemnify, save, and hold harmless County its employees and agents, against any and all claims, damages, liability and court awards including costs, expenses, and attorney fees and related costs, incurred as a result of any act or omission by Offeror, or its employees, agents, subcontractors, or assignees.

18.1.5. Standard and Manner of Performance

Offeror shall perform its obligations in accordance with the highest standards of care, skill and diligence in Offeror's industry, trade, or profession and in the sequence and manner set forth in the Scope of work.

19. RIGHTS IN DATA, DOCUMENTS, AND COMPUTER SOFTWARE

19.1. Any software, research, reports, studies, data, photographs, negatives or other documents, drawings, models, materials, or Work Product of any type, including drafts, prepared by Offeror in the performance of its obligations under the Agreement shall be the exclusive property of the County and, all Work Product shall be delivered to the County by Offeror completion or termination of the Agreement. The County's exclusive rights in such Work Product shall include, but not be limited to, the right to copy, publish, display, transfer, and prepare derivative works. Offeror shall not use, willingly allow, cause or permit such Work Product to be used for any purpose other than the performance of Offeror's obligations hereunder without the prior written consent of the County.

20. SOFTWARE PIRACY PROHIBITION.

20.1. Governor's Executive Order D 002 00. County, State or other public funds payable under the agreement shall not be used for the acquisition, operation, or maintenance of computer software in violation of federal copyright laws or applicable licensing restrictions. Offeror certifies and warrants that, during the term of the Agreement and any extensions, Offeror has and shall maintain in place appropriate systems and controls to prevent such improper use of public funds. If the County determines that

Offeror is in violation of this provision, the County may exercise any remedy available at law or in equity or under the agreement, including, without limitation, immediate termination of the agreement and any remedy consistent with federal copyright laws or applicable licensing restrictions.

21. PROPOSAL EVALUATION INSTRUCTIONS:

21.1. This section is intended to indicate the minimum items required with each proposal in order to be properly evaluated. At a minimum each proposal should include the following information. Please prepare your proposal utilizing the following format. Provide a complete response to each item and include at the front of your proposal.

21.1.1. Experience. The County requires that the Offeror have experience in implementing case management software, include similar projects completed, including dates and cost.

21.1.2. Key Personnel.
Provide a complete list of key personnel on the project and all sub-contractors working on the project, along with their professional experience (project and dates) and their role/responsibility in the project. Indicate how much time for each person, including the Offeror's Project Manager that will be dedicated to this project and each person's role/responsibility with this project.

21.1.3 Project Approach
Provide a response that defines the methods and means by which the Offeror/firm will perform the services outlined in the scope of services. The integration with eDocs must be proven and verifiable by references. Demonstrate project team's knowledge of the area and its issues.

21.1.4. Fee Schedule
A fee schedule by discipline and other billable items.

21.1.5. Terms and conditions for a thirty-six (36) month service agreement including scope of work for annual preventative maintenance agreement.

21.1.6. At least three (3) references shall be provided for similar projects.

21.1.7. A W-9 form shall be completed and returned with proposal.

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22. EVALUATION FACTORS FOR AWARD:

22.1. Award will be made to the responsive, responsible Offeror who submits the most technically acceptable proposal.

22.2. A review committee consisting of members, appointed by the County, will make recommendations to the County Board of Commissioners. The evaluation is based on the individual/firm's qualifications. The committee may request additional information from Offerors or request personal interviews with Offerors.

22.3. The evaluation criteria are listed below in descending order of importance.

23. CRITERIA:

Project Approach to completing the project
Experience of firm
Fee Schedule
Key Personnel assigned to the project

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OFFEROR'S CERTIFICATION OF COMPLIANCE

Pursuant to Colorado Revised Statute, § 8-17.5-101, *et.seq.*, as amended 5/13/08, as a prerequisite to entering into an agreement for services with Adams County, Colorado, the undersigned Offeror hereby certifies that at the time of this certification, Offeror does not knowingly employ or contract with an illegal alien who will perform work under the attached agreement for services and that the Offeror will participate in the E-Verify Program or Department program, as those terms are defined in C.R.S. § 8-17.5-101, *et. seq.* in order to confirm the employment eligibility of all employees who are newly hired for employment to perform work under the attached agreement for services.

OFFEROR:

THE IQ BUSINESS GROUP, INC.

The IQ Business Group, Inc.   _1/28/14_
Company Name   Date

Michael D Beck
Name (Print or Type)

[signature]
Authorized Signature

President & CEO
Title

Note: Registration for the E-Verify Program can be completed at: https://www.vis-dhs.com\employerregistration. It is recommended that employers review the sample "memorandum of understanding" available at the website prior to registering

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Signature Page

IN WITNESS WHEREOF, the Parties have caused their names to be affixed hereto.

BOARD OF COUNTY COMMISSIONERS
ADAMS COUNTY, COLORADO

By:

_____   _2-3-14_____
Chair Signature   Date:

OFFEROR
THE iQ BUSINESS GROUP, INC.

By:

_Michael J. Beck_____   _1/28/14_____
Name (Print or Type)   Date:

_____   _President & CEO_____
Authorized Signature   Title

Attest:
Karen Long, Clerk and Recorder   _Keisha Hus_____
                                     Deputy Clerk

APPROVED AS TO FORM:
Adams County Attorney's Office   By:_____

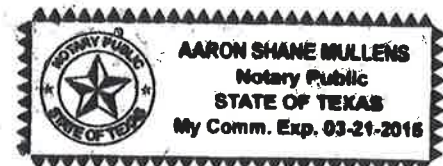   Attorney's Signature

NOTARIZATION:
COUNTY OF _Travis_____)
)SS.
STATE OF _TX_____   )

Signed and sworn to before me this _28th_ day of _January_____, 2014,

by _Michael Beck_____,

_____
Notary Public

My commission expires on: _3-21-15_____

AARON SHANE MULLENS
Notary Public
STATE OF TEXAS
My Comm. Exp. 03-21-2015

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