

**REQUEST FOR PROPOSALS  
FOR  
CONSTITUENT RELATIONS MANAGEMENT SYSTEM**

LEGISLATIVE COUNCIL SERVICE  
490 OLD SANTA FE TRAIL, SUITE 411  
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ISSUE DATE:  
OCTOBER 26, 2022

**NOTICE**

The New Mexico Procurement Code, Sections 13-1-28 through 13-1-199 NMSA 1978, imposes civil and criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for bribes, illegal gratuities and kickbacks.

## TABLE OF CONTENTS

|  | <u>PAGE</u> |
|--|-------------|
| 1. Introduction .....                                | 1           |
| 2. Sequence of Events .....                          | 1           |
| 3. Amendments to RFP .....                           | 3           |
| 4. Cancellation of RFP; Rejection of Proposals ..... | 3           |
| 5. Proposal Format .....                             | 3           |
| 6. Scope of Work .....                               | 5           |
| 7. Evaluation .....                                  | 6           |
| 8. Contract Terms and Conditions .....               | 6           |

## 1. INTRODUCTION

The Legislative Council Service (LCS) invites individuals and organizations (Offerors) to submit proposals in accordance with the outlines and specifications contained in this request for proposals (RFP). This RFP contains specific requests for information. In responding to this RFP, Offerors are encouraged to provide any additional information that they believe is relevant.

The purpose of this procurement is to select a contractor to provide a constituent resource management system for use by House and Senate staff members in addition to the offices of the House and Senate chief clerks.

## 2. SEQUENCE OF EVENTS

| <u>Event</u>  | <u>Date</u>          |
|---|----------------------|
| A. Release of RFP                                     | October 26, 2022     |
| B. Submission of Proposals                            | November 15, 2022    |
| C. Evaluation of Proposals and Selection of Finalists | November 16-18, 2022 |
| D. Oral Presentations and Best and Final Offers       | November 29, 2022    |
| E. Final Offeror Selection                            | November 30, 2022    |
| F. Finalize Contract                                  | December 1-2, 2022   |

The dates for evaluation of proposals, finalist selection, contract award and finalization of the contract are subject to extension at the discretion of the LCS. The effective date of the Contract is tentatively December 5, 2022; however, it is dependent on the selection date, the length of time required for Contract negotiation and the length of time for processing the Contract.

The events identified in the schedule above are briefly described below.

A. Release of RFP. This RFP will be advertised in two (2) newspapers of general circulation pursuant to Sections 13-1-104 and 13-1-113 NMSA 1978. Prospective Offerors may direct questions about the RFP to Amy Chavez-Romero, Procurement Manager, at the LCS, 490 Old Santa Fe Trail, Suite 411, Santa Fe, New Mexico 87501; telephone (505) 986-4600.

B. Submission of Proposals. Offerors shall submit their proposals and supporting documentation in electronic format to [amy.chavez-romero@nmlegis.gov](mailto:amy.chavez-romero@nmlegis.gov). Proposals must be in the format specified in Item 5 of this RFP and must be signed by the Offeror.

The deadline for receipt of proposals by the LCS is November 15, 2022, no later than 4:00 p.m. Proposals will be time-stamped upon receipt.

All proposals shall be submitted with the email subject line: "Proposal for Constituent Relations Management System".

A proposal may be modified by an Offeror prior to the deadline for submission of proposals by emailing a written modification to the above email address. The email subject line shall read "Modification to Proposal for Constituent Relations Management System".

A proposal may be withdrawn prior to the deadline for submission of proposals by delivering email notice or by telephone notification to the persons listed above.

Any proposal or modification received after the deadline for submission of proposals will be considered late. Unless a late proposal is the only one received, no late proposal or late modification will be considered unless it would have been timely but for the action or inaction of the LCS. Time limits will not otherwise be waived.

Proposals will not be opened publicly and will not be open to public inspection until after award of the Contract.

C. Evaluation of Proposals and Selection of Finalists. Proposals will be initially evaluated by the evaluation committee using the criteria listed in Item 7 of this RFP. During the initial evaluation process, the Procurement Manager may seek clarification from Offerors, but shall NOT negotiate with Offerors. Discussions shall not be initiated by the Offerors. The evaluation committee will select finalist Offerors to provide oral presentations, and the Procurement Manager will notify those finalist Offerors of selection as per the sequence of events in this RFP or as soon as possible. A schedule for oral presentations and demonstrations will be determined at this time.

D. Oral Presentations and Best and Final Offers. Finalist Offerors will be required to conduct an oral presentation to include a demonstration of the proposed constituent relations management system via video conference as per the sequence of events in this RFP or as soon as possible.

Finalist Offerors may be asked to submit revisions to their proposals for the purpose of obtaining best and final offers by the date specified in the RFP's sequence of events or as soon as possible. Best and final offers may also be clarified and amended at finalist Offerors' oral presentations.

E. Final Offeror Selection. The evaluation committee will evaluate the oral presentations as provided in Item 7 of this RFP. Based upon its evaluation of the proposals and the oral presentations, the evaluation committee will make a final selection of the most advantageous Offeror, taking into consideration the evaluation factors set forth in this RFP as per the sequence of events or as soon as possible thereafter. The most advantageous proposal may or may not have received the most points. The Offeror selected to perform the work and those Offerors not selected will be notified in writing by the LCS. Selection does NOT constitute an obligation to contract with the successful Offeror.

F. Finalize Contract. After final Offeror selection, any contractual agreement resulting from this RFP will be finalized with the most advantageous Offeror. In the event that mutually agreeable terms cannot be reached with the apparent most advantageous Offeror in the time frame

specified, the LCS reserves the right to finalize a contractual agreement with the next most advantageous Offeror(s) without undertaking a new procurement process.

### **3. AMENDMENTS TO RFP**

If there are any amendments to this RFP, they shall be in writing and shall be emailed to all individuals who have notified the LCS of their intent to respond to the RFP and shall be posted on the legislative website at:

[https://www.nmlegis.gov/Publications/Request For Proposals](https://www.nmlegis.gov/Publications/Request_For_Proposals).

Amendments shall be distributed with sufficient time to allow Offerors to consider the amendments in preparing their proposals. If necessary, the deadline for submission of proposals will be extended by the amendment.

The written acknowledgment form sent with the amendment shall be completed by the Offeror and submitted with the proposal as evidence of receipt of the amendment.

### **4. CANCELLATION OF RFP; REJECTION OF PROPOSALS**

The LCS reserves the right to cancel this RFP at any time and for any reason.

Any and all proposals may be rejected in whole or in part when it is in the interest of the LCS to do so. The LCS shall not be responsible for the payment of any costs incurred by the Offeror in the preparation or submission of a proposal.

The issuance of this RFP, the receipt of proposals or the selection of a Contractor in no manner obligates the LCS to the eventual purchase of services. This process is solely at the discretion of the LCS and may be terminated without penalty or obligation at any time prior to the signing of a written contract.

### **5. PROPOSAL FORMAT**

Offerors shall include the following information in their proposals:

A. Letter of Transmittal. Include the following information:

- (1) the name, address, email address and telephone number of the Offeror;
- (2) the name and telephone number of the primary contact for the Offeror;
- (3) the signature of the Offeror;
- (4) the date of the proposal;

(5) a statement that the Offeror, if awarded the Contract, will comply with the Contract terms and conditions set forth in this RFP; and

(6) a statement that the Offeror's proposal is valid for sixty (60) days after the deadline for submission of proposals.

B. Description of Services. Describe how the services will be provided or what tasks will be performed in response to the scope of work contained in Item 6 of this RFP. The scope of work indicates "what" the Offeror is supposed to do; the description of services should show "how" the Offeror intends to perform the services.

C. Remuneration. The Offeror shall state the maximum project cost to the LCS for providing services to the LCS pursuant to the Contract, whether based on an hourly rate or a lump-sum fee for services. The rate will be that agreed upon by the LCS and the Contractor but not in excess of prevailing rates in the state for comparable services. The Contractor shall be compensated monthly for work performed in the preceding month. The Contractor shall be reimbursed for incurred and separately stated applicable gross receipts taxes.

D. Related Experience and Qualifications. Offerors should identify those individuals who will be involved in providing the services and should include the relevant education, training and prior experience of each listed individual. Additionally, the resumes of all key personnel should be included. This portion of the proposal should demonstrate the extent to which the Offeror is qualified to perform both the scope of work outlined in this RFP and the specific services contained in the description of services portion of the Offeror's proposal.

Offerors should include a list of references from individuals who are familiar with the work of the Offeror and who are aware of the Offeror's performance on similar tasks or projects.

The Offeror's ability to meet the evaluation factors contained in Item 7 of this RFP shall be stated in this section of the proposal.

E. Resident Business and Resident Veteran Business Preference. To receive a resident business, Native American resident business, resident veteran business or Native American resident veteran business preference, pursuant to Sections 13-1-21 and 13-1-22 NMSA 1978, Offerors must include a copy of their preference certificate with the proposal. Certificates for preferences can be obtained through the Taxation and Revenue Department (<https://www.tax.newmexico.gov/businesses/in-state-veteran-preference-certification/>).

## **6. SCOPE OF WORK**

A. The Contractor shall create a constituent relations management system, which will include:

(1) a constituent relations management database to track all communications, including emails, phone calls, texts and in-person visits between legislators or legislative staff and constituents;

(2) the capability of tracking and reporting constituent data and demographics;

(3) high-security features to protect confidential or sensitive materials;

(4) cross cutting communication mechanisms to allow for increased coordination between legislative staff, including mechanisms for legislative staff to determine whether a constituent has contacted multiple offices about the same issue and which office is working on a particular issue for a particular constituent;

(5) mechanisms to track the status of each constituent case, including, but not limited to, notes, case progression information and staff assignments;

(6) mechanisms to allow legislative staff to refer constituent cases between the offices of the House and Senate chief clerks, legislative leadership staff offices and executive branch offices and to allow sharing of notifications of constituent case status between those offices;

(7) a tagging system to mark inbound and outbound communications with constituents showing interest or requiring assistance within certain subject areas;

(8) a mechanism for clustering incoming mail, including a mechanism to cluster mass emails of the same subject together and allow for template responses to such mass emails;

(9) mechanisms to allow targeted communication to be used with constituent data, including the ability to use tags established in the constituent relations management database; and

(10) tools for constituent engagement, including rapid email response, template responses, email newsletters and individual and form letter responses.

B. The Contractor shall extensively test the system to ensure it meets the required specifications and interoperability with existing systems in use by legislative staff. The Contractor shall create a detailed user manual for each application of the constituent relations management system and provide in-person training for users of the system.

C. The Contractor shall provide ongoing maintenance, technical support and trouble-shooting to legislative staff, and technical support staff will be available to answer for such services from 8:00 a.m. to 5:00 p.m. M.S.T.

## **7. EVALUATION**

The responsible Offeror whose proposal is most advantageous to the legislative leadership offices and the House and Senate chief clerks shall be selected to perform the services. The inclusion of cost as a factor does not require selection of the lowest cost proposal. The following evaluation factors shall be considered in order of importance:

- (1) related experience and qualifications (30%);
- (2) the ability to perform the work as requested (30%);
- (3) cost (20%);
- (4) client references (10%); and

(5) oral presentation (10%), including (8%) for online demonstration of ability to meet legislative staff needs for a constituent relations management system and (2%) for oral presentation content.

An additional 8% of the total weight of the factors used in evaluating the proposal will be awarded to an Offeror that provides a copy of the Offeror's resident business or Native American resident business preferences certificate. An additional 10% of the total weight of the factors used in evaluating the proposal will be awarded to an Offeror that provides a copy of the Offeror's resident veteran business or Native American resident veteran business certificate. An Offeror will not be awarded both a resident business preference and a resident veteran business preference or a Native American resident business preference and a Native American resident veteran business preference.

## **8. CONTRACT TERMS AND CONDITIONS**

The Contract between the LCS and the successful Offeror shall contain substantially the following terms and conditions. In the letter of transmittal, the Offeror shall include a statement agreeing to these terms and conditions and explaining any terms or conditions with which the Offeror does not agree.

A. Scope of Work. This portion of the Contract will be drafted following selection of a Contractor to perform the services. It will incorporate the scope of work in Item 6 of this RFP and the description of services from the Offeror's proposal.



B. Compensation. The total compensation shall not exceed the limit specified in the Contract. The total amount shall include applicable New Mexico gross receipts taxes for services, which shall be paid by the Contractor. The hourly rate or other basis for compensation shall be specified in the Contract.

C. Term. The term of the Contract will be determined by mutual agreement of the director of the LCS and the Contractor and incorporated into the Contract.

D. Termination. The Contract may be terminated by either of the parties upon written notice delivered to the other party at least thirty (30) days prior to the intended date of termination. A party may not nullify obligations or liabilities already incurred for performance or for failure to perform prior to the date of termination.

E. Status of Contractor. The Contractor is an independent contractor performing professional services for the LCS and is not an employee of the State of New Mexico. The Contractor shall not accrue leave, retirement, insurance, bonding, use of state vehicles or any other benefits afforded to employees of the State of New Mexico by virtue of the Contract.

F. Assignment. The Contractor shall not assign or transfer any interest in the Contract or assign any claims for money due or to become due under the Contract without the prior written approval of the LCS.

G. Subcontracting. The Contractor shall not subcontract any portion of the services to be performed under the Contract without the prior written approval of the LCS.

H. Records and Audit. The Contractor shall maintain detailed time records that indicate the date, time and nature of services rendered. These records shall be subject to inspection by the LCS and the State Auditor. The LCS shall have the right to audit billings both before and after payment. Payment under the Contract shall not foreclose the right of the LCS to recover excessive or illegal payments.

I. Release. The Contractor shall, upon final payment of the amount due under the Contract, release the LCS, its officers and employees and the State of New Mexico from all liabilities, claims and obligations whatsoever arising from or under the Contract. The Contractor agrees not to purport to bind the State of New Mexico to any obligation not assumed in the Contract by the State of New Mexico, unless the Contractor has express written authority from the LCS to do so, and then only within the strict limits of that authority.

J. Confidentiality. Any information provided to or developed by the Contractor in the performance of the Contract shall be kept confidential and shall not be made available to any individual or organization without the prior written approval of the LCS.

K. Product of Service; Copyright. All materials developed or acquired by the Contractor under the Contract shall become the property of the State of New Mexico and shall be delivered to the

LCS no later than the termination date of the Contract. Nothing produced, in whole or in part, by the Contractor under the Contract shall be the subject of an application for copyright by or on behalf of the Contractor.

L. Conflict of Interest. The Contractor shall warrant that the Contractor has no interest and shall not acquire any interest, direct or indirect, that would conflict with the performance of services required under the Contract.

M. Amendment. The Contract shall not be altered, changed or amended except by an instrument in writing executed by the parties.

N. Merger. The Contract shall incorporate all of the agreements, covenants and understandings between the parties thereto concerning the subject matter thereof. No prior agreement or understanding, verbal or otherwise, of the parties shall be valid or enforceable unless embodied in the Contract.

O. Applicable Law. The Contract shall be governed by the laws of the State of New Mexico.

P. Waiver. The Contract shall contain a provision that states that no waiver of any breach of the Contract or any of its terms or conditions shall be a waiver of any other or subsequent breach; a waiver shall not be valid unless it is in writing and signed by the party granting the waiver.

Q. Appropriation. The terms of the Contract are contingent upon sufficient appropriations and authorization being made to the LCS by the New Mexico Legislature or other funding agency. If sufficient appropriations and authorization are not made by the New Mexico Legislature or other funding agency, the Contract shall, notwithstanding the provisions of any other section of the Contract, terminate immediately upon the Contractor's receipt of written notice of termination from the LCS. The LCS's decision as to whether sufficient appropriations and authorization are made by the New Mexico Legislature shall be accepted by the Contractor and shall be final.

R. Notice. The Procurement Code, Sections 13-1-28 through 13-1-199 NMSA 1978, imposes civil and criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for bribes, illegal gratuities and kickbacks.

S. Equal Opportunity Compliance. The Contractor shall agree to comply with all federal and state laws pertaining to equal employment opportunity. In accordance with all such laws, the Contractor shall agree to assure that no person in the United States shall, on the grounds of race, color, national origin, sex, sexual preference, age or handicap, be excluded from employment with or participation in, be denied the benefits of or be otherwise subjected to discrimination under any program or activity performed under the Contract. If the Contractor is found to be not in compliance with these requirements during the life of the Contract, the Contractor shall agree to take appropriate steps to correct these deficiencies.