



**REQUEST FOR PROPOSAL (RFP)
SENIOR LEADERSHIP DEVELOPMENT
RFP # 0139**

ISSUED: JUNE 14, 2024

RESPONSES DUE: JULY 15, 2024

**LIFEPATH SYSTEMS
1515 HERITAGE DR.
MCKINNEY, TX 75069**

For RFP Questions:

Angela James

Administration Contracts Manager

Procurement_inquiries@lifepathsystems.org



INVITATION

Background Information

Collin County Mental Health Mental Retardation Center d/b/a LifePath Systems (the “Center”) was founded in 1986. It is the Local Behavioral Health Authority (LBHA) and the Local Intellectual and Developmental Disabilities Authority (LIDDA) for Collin County, Texas as authorized by the Texas Health and Human Services Commission (HHSC). In addition to its role as Authority, the Center is a provider of behavioral health services and a provider of services for individuals with intellectual or developmental disabilities.

Throughout this RFP, reference to “Center” is assumed to define and include LifePath Systems. Reference to the “vendor” is assumed to include the vendor and any other vendors and/or personnel with which the vendor has elected to partner for purposes of this RFP.

The Center is seeking Formal Bid Proposals from Vendors for Senior Leadership Development Training.

If you are interested in submitting a Proposal, please carefully adhere to the Instructions, requirements, attachments, and deadlines presented in RFP # 0139. A copy of the Request for Proposal (RFP) may be obtained from the Center’s website at <https://www.lifepathsystems.org/connect-with-us/contracting-opportunities/> or by contacting Angela James, Admin Contracts Manager, procurement_inquiries@lifepathsystems.org.

The Center is subject to and complies with the Texas Public Information Act, Chapter 552 of the Texas Government Code therefore following Contract award, the contents of all proposals may be made available upon written request. Therefore, any information contained in the proposal that is deemed to be proprietary in nature must clearly be so designated in the proposal. Such information may still be subject to disclosure under the Public Information Act depending on opinions from the Attorney General’s office.

Vendors shall pay particular attention to all **INSTRUCTIONS, REQUIREMENTS, ATTACHMENTS and DEADLINES** indicated in the attached Proposal and should govern themselves accordingly.

In accepting proposals, the Center reserves the right to reject any and all proposals, to waive formalities and reasonable irregularities in submitted documents, and to waive any requirements in order to take the action, which it deems to be in the best interest of the Center and is not obligated to accept the lowest Proposal. This RFP does not obligate the Center to pay for any costs incurred by respondents in the preparation and submission of a proposal. Furthermore, the RFP does not obligate the Center to accept or contract for any expressed or implied services.

APPEALS and/or PROTEST. Any Respondents wishing to protest or appeal the selection process must do so within 7 days of the proposal award. Protest or appeals must clearly state with specificity the grounds upon which the award selection is being challenged. Send via certified mail to:

The Center appreciates your time and effort in preparing this proposal. All proposals must be received at the specified location identified in RFP # 0139 before opening date and time. The official time shall be determined by the time/date stamp when received at location.

LifePath Systems
Attn: Angela James
1515 Heritage Drive
McKinney, TX 75069

Angela James
Administration Contracts Manager
procurement_inquiries@lifepathsystems.org



TABLE OF CONTENTS

SCOPE OF SERVICES 4

TERM..... 6

SUBMITTAL SCHEDULE..... 6

PROPOSAL DEADLINE..... 7

PROPOSAL INSTRUCTIONS AND FORMAT..... 7

APPLICATION..... 9

EVALUATION CRITERIA..... 12

ASSURANCES, CERTIFICATIONS, EXHIBITS, AND ATTACHMENTS..... 12

 ATTACHMENT A..... 13

 ATTACHMENT B..... 14

 ATTACHMENT C..... 16

 ATTACHMENT D..... 17

 ATTACHMENT E..... 17

 ATTACHMENT F..... 18

 ATTACHMENT G..... 19

 ATTACHMENT H..... 20

NOTICE “NOT TO PARTICIPATE” FORM..... 21

SCOPE OF SERVICES SENIOR LEADERSHIP DEVELOPMENT

PROJECT OVERVIEW:

The Center is seeking a vendor to provide a provide training for middle level leaders to prepare for a Senior Leadership role at LifePath Systems. There will be a total of 15 sessions to be held one day per month for four-hours each. Training will be a combination of both onsite at (McKinney, TX) and through a virtual online solution provided by the Center. Training to begin as soon as possible but not later than in the month of August 2024.

A. CONTRACTOR RESPONSIBILITIES

- i. The Vendor shall design a proposed senior leadership development program which takes into consideration the following:
 - a. A program designed for a group setting with specific topics/content recommended for participating middle level leaders to prepare for a Senior Leadership Role at LifePath Systems
 - b. An extensive curriculum and facilitated sessions with appropriate course materials including training decks, participant guides and developmental-focused resources
 - c. Assessments and leadership development coaching as needed for career development and success coaching for program as identified in a collaborative process
 - d. Assessments and success coaching as recommended by executive team members and senior level staff with a focus on succession planning and managing leadership transitions. Examples of opportunities for competencies to be developed may consist of the following engagement outcomes:
 - 1) The Difference Between Leadership and Management
 - 2) Enhanced collaboration and conflict resolution
 - 3) Effective Communication in Organizations
 - 4) Situational leadership & employee development
 - 5) Building and sustaining trust
 - 6) Creating high performance teams and Team performance
 - 7) Employee engagement & Performance
 - 8) The value of performance management
 - a) Evaluation of staff and system
 - b) Giving and Receiving feedback
 - 9) Mentoring & Coaching
 - a) Coaching of staff
 - 10) Navigating the union environment
 - 11) Customer Service
 - 12) Opportunities for increased employee engagements
 - 13) Understanding Organizational Culture
 - 14) Culture and change
 - 15) Managing for higher performance
 - 16) Basics of supervision
 - 17) The Supervisor and the Organization
 - 18) Leadership Traits
 - 19) Learning to Lead
 - 20) General Management Education
 - 21) Functional Management Programs
 - 22) Influencing Others
 - 23) Building relationships

ii. Vendor's program shall:

- a. Support LifePath Systems Workforce Members in developing leadership skills and achieving goals
- b. Address various levels of employees, including non-management and management
- c. Cultivate a pipeline of future leaders with long-term commitment
- d. Reinforce a highly participatory and interactive learning environment
- e. Establish a model with emphasis on building knowledge, skills, and abilities which enhance organizational culture
- f. Customize experiences for participants as opposed to a general, one size fits all approach

iii. Minimum Standards for All Prospective Vendors

A prospective vendor must affirmatively demonstrate / meet the following requirements:

- a. Vendor must have adequate financial resources, or the ability to obtain such resources as required;
- b. Vendor must be able to comply with the required or proposed delivery schedule.
- c. Vendor must have a satisfactory record of performance as evidenced by references;
- d. Vendor must have a satisfactory record of integrity and ethics as evidenced by references;
- e. Vendor must have the ability to provide usage data on items ordered or delivered;
- f. Vendor must have the ability to package or mark items for specific LifePath Systems units;
- g. Vendor must be able to provide descriptive information as required, including detailed scope of work to be provided and frequency if applicable;
- h. Vendor must be otherwise qualified and eligible to receive an award; and,
- i. Vendor must be able to meet any additional requirement specified in the RFP.

B. LIFEPATH SYSTEM RESPONSIBILITIES

LifePath Systems will:

- i. Provide training facility (to include audio/visual equipment)
- ii. LifePath Systems will provide lunch during training sessions

C. DELIVERABLES AND MEASURABLES:

LifePath Systems Senior Workforce Members will be more confident and effective in their leadership abilities due to improved personal interaction gleaned from the series of leadership training sessions. As a result, LifePath Systems will see an increased improvement in outcomes and performance measures.

D. VENDOR QUALIFICATIONS

Vendor Minimum Qualifications

- i. Vendor, Vendor's principal, or Vendor's staff shall have been regularly engaged in the business of providing leadership development training programs in instructor-led, virtual, and web-based formats for at least ten (10) years.
- ii. Vendor should have the required certifications, authority, or expertise to provide the training curriculum.
- iii. Vendor shall possess all permits, licenses, and professional credentials necessary to perform services as specified under this RFP.

E. MATERIAL SPECIFICATIONS

All materials provided may be reused by the Center at no additional costs unless copyright protected.

TERM

As you evaluate your approach to provide services, you are encouraged to recommend contract options and address the relative advantages and disadvantages of your recommendations. Contract duration must allow early termination without penalties to the Center in the event the Texas Health and Human Services Commission terminates revenue contracts to the Center. The contract can also be terminated for cause. Contract funding and length is contingent upon funding received by Health and Human Services Commission.

FEE/PRICE

Pricing and fees must be submitted in accordance with instructions in the RFP and in the application that clearly identifies specifications. A proposed reimbursement structure must be submitted with completed Proposal Submission to be considered for evaluation of RFP.

SUBMITTAL PROPOSED SCHEDULE

Task	Date
RFP Issue Date	06/14/2024
Response Due	07/15/2024
Complete Proposal Review & Evaluation	07/16/2024
Vendor Notification	07/19/2024
Anticipated Contract Start Date	08/01/2024

NOTE: All dates are subject to change.

Vendors are responsible for reviewing , <https://www.lifepathsystems.org/connect-with-us/contracting-opportunities/> for any published addenda.



PROPOSAL DEADLINE

Request for proposal packets may be obtained on the Center's website, <https://www.lifepathsystems.org/connect-with-us/contracting-opportunities/>. Responses to the Request for Proposal (RFP) must be received by the Center by 5:00 pm CDT 07/15/2024. If you are submitting an electronic copy via email, your attachment must include the RFP number, your company name, and the date it was sent. If you mail your proposal, it must be postmarked prior to the submission deadline.

PROPOSAL INSTRUCTIONS AND FORMAT

All required documentation must be submitted with the proposal. The Vendor is cautioned to read the entire RFP to determine all requirements. LifePath Systems RESERVES THE RIGHT TO REJECT A PROPOSAL WHICH DOES NOT CONTAIN ALL INFORMATION REQUIRED BY THE RFP.

1. All Proposals must be submitted in accordance with the following no later than July 15, 2024, at 5:00p.m. All Proposals must be submitted via secure methods whether email or mail with the following format:

Mail

LifePath Systems
Attn: Angela James
REQUEST FOR PROPOSAL RFP # 0139
SENIOR LEADERSHIP DEVELOPMENT
1515 Heritage Drive
McKinney, TX 75069
DO NOT OPEN IN MAILROOM

OR

Email:Procurement_inquiries@lifepathsystems.org

Subject Line: REQUEST FOR PROPOSAL RFP # 0139
LifePath Systems
Attn: Angela James
REQUEST FOR PROPOSAL RFP # 0139
SENIOR LEADERSHIP DEVELOPMENT

Proposals will not be opened until after the deadline.

2. Late Proposal or modifications - Proposal and modifications received after the time set for submission will not be considered.
3. If submitted via Mail - To achieve a uniform review process and to obtain a maximum degree of comparability, LifePath Systems requires that Proposals be submitted with one (1) master (marked original) and one (1) copy.
4. The Proposal should include:
 - a. Fully completed signature Page executed by a duly authorized signing officer of the Vendor.
 - b. Title Page - Title page must show the RFP subject; the Vendor's name; the name address, and telephone number of a contact person; and the date of the proposal.
 - c. Transmittal Letter - Submit a signed letter briefly addressing the Vendor's understanding of the work to be done, the commitment to do the work detailed within this RFP and a statement explaining why the Vendor believes itself to be best qualified to do the required work.
 - i. Vendor Representative - Include the name of the designated individual(s), along with respective telephone number(s), email address(es), who will be responsible for answering technical and contractual questions with respect to the proposal.



d. Vendor Application - must be filled out in its entirety.

Response format as follows: State the question or item exactly as appears; then provide your detailed response.

e. All application response attachments must be labeled to reference the appropriate section and letter (i.e., "VI. a.")

5. A STATEMENT CONFIRMING THAT YOU HAVE READ, UNDERSTAND, AND AGREE TO THE GENERAL AFFIRMATIONS LOCATED AT: <https://www.lifepathsystems.org/wp-content/uploads/2021/05/General-Affirmations.pdf>

The selected vendor will be required to adhere to all Texas contract and confidentiality requirements.

Your response may also contain any narrative, charts, tables, diagrams, or other materials in addition to those called herein; to the extent such additions are useful for clarity or completeness of the response. Attachments should clearly indicate on each page the paragraph in the RFP to which they pertain. The Center will not be liable for any errors in your proposals.

No modifications to your proposal will be accepted except during negotiations initiated by the Center.

Any verbal communication will be considered unofficial and non-binding regarding this RFP and subsequent award.

The Center shall be allowed to keep all materials submitted by the respondents regarding this RFP. Each respondent agrees to hold the Center harmless against any expenses, damages, and claims arising from or connected with your proposal, including patent, trademarks, copyright, or other intellectual property infringement or misappropriation.

Any media request of the respondents shall be concurrently directed to the Center during the receipt, analysis, selection, and subsequent contract negotiation until said contract is signed and delivered by the Center.

Your proposal constitutes an offer that remains open and irrevocable for a period of no less than 90 days unless your proposal states otherwise. Proposals after the award are public documents.

APPLICATION

I. Business Demographic

Organization Name: _____

Organization dba Name (if applicable): _____

Federal Tax ID Number: _____

Business Address: _____

Contact/Title: _____

Email Address: _____

Physical Address: _____

Phone/Fax: _____

Other Owners/Partners – Name/% Ownership/If corporate, list organization:

1. _____

2. _____

3. _____

4. _____

Type of Organization (i.e., Non-Profit Corporation, Limited Liability, General Partnership, etc.):

Years in operation: _____

Hours of operations: _____

Certification Number if a Historically Underutilized Business (HUB): _____

Qualifications if HUB eligible, but not certified: _____

List all licenses, credentials, certifications, and/or accreditations currently held by organization: (provide copies if applicable)

II. Business Requirements

a. Describe Respondent’s company history, evidencing its strengths and stability, licensing information (if applicable), number of years providing the type of proposed service, existing customer satisfaction data, number of customers in Texas and areas covered in Texas.

b. Will you provide Dedicated Account Management?

i. Explain your approach, including prime contact, support team, escalation process and point of contact, and other details.

ii. Identify any individuals who will be responsible for program implementation and administration and facilitators/trainers expected to deliver proposed training.

iii. Provide detailed resumes of team members who will be directly working on the project.

c. Please feel free to include any additional skills, experiences, qualifications, and/or other relevant information about the Respondent’s qualifications.

III. Technical Approach

a. Vendors are required to describe the procedures and methods that will achieve the required outcome of the project;

b. Overall program description and project approach;

c. What is your proposed curriculum that details the scope and sequence of the Senior Leadership topics to be trained? Describe what these include. Can provide a sample design.

d. Describe how the learning content, facilitator guides, and support learning resources can be accessed and provide information on technical requirements to gain access or special hardware or equipment necessary for

access to the training.

- e. Describe your presentation style and how it will support effective learning for the staff.
- f. Draft training schedule including the proposed course topics, start and end times, delivery method (classroom, virtual, self-paced, micro-learning, etc.).
- g. Describe how you plan to engage the participants, so they are prepared for a future Senior Management Role.
- h. Description of how to measure Return on Investment (ROI) for final program evaluation.

IV. Training Content

- a. Quality of training content – Do you provide training content that includes samples of interactive case studies, quizzes and skill building activities. Describe the services you provide.
- b. Variety of formats and versions- Do you provide interactive training offered in a variety of formats including classroom instructor-led designs, and virtual instructor-led and online formats that are mobile and web accessible. In addition to multiple formats, will the courses have different versions and designs for a variety of lengths of training offerings? Describe the services you provide.

V. Proposed Reimbursement Structure

- a. Propose a cost structure for these services.
- b. Provide detail on any additional costs that are not part of your Proposal.
- c. All prices to be provided in US currency.
- d. All expenses and service fees that are in excess of normal charges require the prior written consent of the Chief Executive Officer.
- e. There will be a price protection period of 36 months after the effective date of the contract. If not able to comply, provide additional information relevant to the price protection period and rate increases in your Proposal.

VI. Certificate of Insurance

Provide a Certificate of Insurance secured and maintained with an insurance company, or companies, licensed to do business in Texas for the following coverage in the following amounts:

- a. Comprehensive general liability, professional liability, and employee misconduct insurance with limits of at least \$1,000,000 per occurrence, \$3,000,000 aggregate.
- b. Sufficient coverage to meet the requirement of State law for Workers' Compensation on its employees' providing services under this Contract.

VII. Client References

Provide three (3) references from companies utilizing the same or similar training that the Center is seeking to procure. At least one of these companies should be a current customer who contracted with you within the past year:

- a. Each reference should include the company name, a brief description of the services provided to the customer, length of the relationship, and contact information consisting of:
 - Contact name and Title
 - Business Address
 - Telephone Number
 - Email Address
- b. At the Partnership's discretion, the Proponent's reference(s) may be interviewed to assist with the rating of the Proponent's services and responsiveness to client's support requirements. The areas which would be addressed include, but are not limited to:
 - Overall satisfaction (Proponent staff, service);
 - Quality and Quantity of support
 - Expected versus actual performance.
 - Emergence of any additional costs
 - Effectiveness and Efficiency of Proponent



EVALUATION CRITERIA

The selection and approval of the Vendor will be made in accordance with the Center's competitive bidding and selection process. An evaluation committee will evaluate proposals based on the guidelines set forth in this RFP and will present its findings to the Center's Management. LifePath Systems reserves the right to request additional information and clarification of any information submitted, including any omission from the original proposal. All proposals will be treated equally regarding these elements.

LifePath Systems intends to solicit, evaluate, and negotiate proposed terms from qualified Vendors to determine which proposal will serve the best interests of the organization by providing the best value¹. Once it is determined that a proposal meets the requirements, the LifePath Systems evaluation team will score each proposal. In determining best value for the organization, LifePath Systems will consider:

1. Cost Proposal.
 - a. Proposed rates and level of service are reasonable and appropriate in relation to the services requested.
 - b. Whether the Vendors financial resources are sufficient to perform the contract and to provide the service(s);
2. The reputation of the Vendor and of the Vendor's services.
 - a. Experience of the Vendor in providing training that prepares, enhances, and develops the supervisory, management, and leadership competence of existing employees with tangible strategies and tools for upper management positions in organizations.
 - b. Whether the Vendor can perform the contract or provide the service(s) within the contract term, promptly provide the services, without delay or interference;
3. The quality of the Vendor's services.
 - a. The Vendor's proposed methodology is reasonable and logical and will ensure that LifePath Systems requirements will be met and indicates that the Vendor has a clear understanding of the scope of services required.
4. The extent to which the services meet the Center's needs.
 - a. Demonstrated ability of the Vendor to provide the resources necessary for the timely and efficient implementation of LifePath Systems goals and objectives as described in this solicitation.
5. The Vendor's references.
 - a. Demonstrated successful experience and capability of the vendor proposed for this project in providing the services described in this Request for Proposals.
6. The impact on the ability of the Center to comply with laws and rules relating to contracting with historically underutilized businesses and nonprofit organizations employing persons with disabilities.
 - a. Demonstrated experience and commitment of the Vendor to assist LifePath Systems in meeting its requirement and goals related to Minority/Women Business Participants.
7. The total long-term cost to the Center to acquire the Vendor's services; and any relevant criteria specifically listed in the request for proposals.
 - a. A budget narrative that clearly explains all assumptions and justifies all line items in the proposed budget.
8. Any additional factors relevant to determining the best value for LifePath Systems in the context of this procurement.

Proposals will be scored using the following criteria:

1. Technical Response (30 points)
2. References (30 points)
3. Pricing (40 points)

¹ Texas Local Government Code §252.043(a)(b) Award of Contract



ASSURANCES, CERTIFICATIONS, EXHIBITS, AND ATTACHMENTS

Vendor must submit the Assurance and Certifications and all Attachments requested, to include:

1. Signature Page (Attachment A)
2. Resident/Non-Resident Certification (Attachment B)
3. Assurances Document (Attachment C)
4. Conflict of Interest Questionnaire (Attachment D)
5. Form W-9 (Attachment E)
6. Attestation for Reading Texas Health and Safety Code §250.006 signed by Authorized Individual (Attachment F)
7. Lobbying Certification (Attachment G)
8. Deviation Form (Attachment H)
9. Questions or Inquires: All questions must be submitted electronically no later than 5:00 pm CDT on 06/21/2024.

LifePath Systems

Angela James

Email: procurement_inquiries@lifepathsystems.org

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the LifePath Systems Behavioral Health Division**



**ATTACHMENT A
SIGNATURE PAGE**

The attached proposal application is being submitted in response to the Senior Leadership Development RFP # 0139. The proposal is a firm offer and shall remain an open offer, valid ninety (90) days from the date of this document.

LifePath Systems in its sole and absolute discretion shall have the right to award contracts for any or all materials listed in each proposal, shall have the right to reject all proposals and shall not be bound to accept the lowest proposal and shall be allowed to accept the total proposal of any one vendor. I understand that this proposal will be reviewed and evaluated according to the procedures indicated in this RFP.

Authorized Signature

Typed or Printed Name

Title

Date

Company

Street Address

City, State, Zip Code

Telephone Number

Fax Number

Email

ATTACHMENT B
RESIDENT/NON- RESIDENT CERTIFICATION

Contractor must answer the following questions in accordance with the **Texas Government Code §2252.002**, as amended:

1. Is the Contractor that is making and submitting this bid a “resident Contractor” or a “non-resident Contractor”?

Answer: _____ Resident Contractor _____ Non-resident Contractor

A Texas Resident Contractor is a Contractor whose principal place of business is in Texas and includes a Contractor whose ultimate parent company or majority owner has its principal place of business in Texas.

2. If the Contractor is a “Non-resident Contractor”, does the state in which the Nonresident Contractor’s principal place of business is located have a law requiring a Nonresident Contractor of that state to bid a certain amount or percentage under the bid of a Resident Contractor of that state in order for the nonresident Contractor of that state to be awarded a contract on his bid in such state?

Answer: _____ Yes _____ No _____ Which state? ____

3. If the answer to Question B is “yes”, then what amount, or percentage must a Texas Resident Contractor bid under the bid price of a Resident Contractor of that state to be awarded a contract on such bid in said state?

Answer: _____

ATTACHMENT C ASSURANCES DOCUMENT

The Vendor assures the following:

1. All addenda and attachments to the RFP as distributed by the Local Authority and designated by the checklist have been received.
2. No attempt has been or will be made by the Vendor to induce any person or Vendor to submit or not to submit a Proposal, unless so described in its Proposal.
3. The Vendor does not discriminate in its services or employment practices based on race, color, genetic information, religion, sex, national origin, disability, veteran status, or age.
4. All cost and pricing information is reflected in the RFP response documents or attachments.
5. The Vendor accepts the terms, conditions, criteria, and requirements set forth in the RFP.
6. The Vendor accepts the Center's right to cancel the RFP at any time prior to Contract award.
7. The Vendor accepts the Local Authority's right to alter the timetables for procurement that are set forth in the RFP.
8. The Proposal submitted by the Vendor has been arrived at independently without consultation, communication, or agreement for the purpose of restricting competition.
9. Unless otherwise required by law, the information in the Proposal submitted by the Vendor has not been knowingly disclosed by the Vendor to any other Vendor prior to the notice of intent to award.
10. No claim will be made for payment to cover costs incurred in the preparation of the submission of the Proposal or any other associated costs.
11. Local Authority has the right to complete background checks and verify information.
12. The individual(s) signing this document and any Contract awarded to Vendor is authorized to legally bind the Vendor.
13. No employee of the Local Authority and no member of the Local Authority's Board will directly or indirectly receive any pecuniary interest from an award of the proposed Contract to Vendor. If the Vendor is unable to make the affirmation, then the Vendor must disclose any knowledge of such interests.
14. The Vendor is not currently held in abeyance or barred from the award of a federal or state contract.
15. The Vendor is not currently delinquent in its payments of any franchise tax or state tax owed to the state of Texas, pursuant to Texas Business Corporation Act, Texas Civil Statutes) Article 2.45.
16. The Vendor shall disclose whether any of the directors or personnel of Vendor has either been an employee or a trustee of the Local Authority within the past two (2) years preceding the date of submission of the Proposal. If such employment has existed, or at term of office served, the Proposal shall state in an attached writing the nature and time of the affiliations.



17. The Vendor shall identify in the attached writing any trustee or employee of Local Authority who has a financial interest in the Vendor or who is related within the second degree by consanguinity or affinity to a person having such financial interest. Such disclosure shall include a complete statement of the nature of such financial interest and the relationship, if applicable.
18. No former employee or officer of the Local Authority directly or indirectly aided or attempted to aid in procurement of Vendor's service.
19. The Vendor shall disclose in an attached writing the name of every Local Authority employee and/or member of Local Authority's board with whom the Vendor is doing business or has done business during the 365-day period immediately prior to the date on which the Proposal is due. Failure to include such a disclosure will be a binding representation by Vendor that the natural person executing the Proposal has no knowledge of any key persons with whom the Vendor is doing business or has done business during the 365-day period prior to the immediate date on which the Proposal is due.
20. Under Section 231.006, Family Code, the Vendor, or applicant certifies that the individual or business entity named in this contract, bid, or application is not ineligible to receive the specified grant, loan, or payment and acknowledges that this contract may be terminated, and payment may be withheld if this certification is inaccurate. For purposes of the foregoing sentence, "Vendor or applicant" shall mean Vendor; contract, bid or application shall mean the Proposal; and "this contract" shall mean any Contract awarded to the Successful Vendor(s).

Authorized Signature

Company Name

Typed or Printed Name

Title

Date

Email

Telephone Number



ATTACHMENT D CONFLICT OF INTEREST QUESTIONNAIRE

Please retrieve CIQ Form from the following website:

<https://www.ethics.state.tx.us/data/forms/conflict/CIQ.pdf>

(Attach completed CIQ Form as part of your proposal)

A signature is required in Box 7 regardless of any other entry on the form.

For the purposes of this Attachment E, the term "Local government officer" means a member of LifePath Systems' Board of Trustees, Chief Executive Officers, and/or an agent of LifePath Systems who exercises discretion in the planning, recommending, selecting, or contracting **(See Attachment K)**.

ATTACHMENT E FORM W-9

REQUEST FOR TAXPAYER IDENTIFICATION NUMBER AND CERTIFICATION

Vendors are to complete a W-9 Form and submit with Proposal Documents.

<http://www.irs.gov/pub/irs-pdf/fw9.pdf>



ATTACHMENT F
NOTICE OF FELONY CONVICTION

Contractor acknowledges they have reviewed the Texas Health and Safety Code §250.006 regarding Notice of Felony Conviction.

Authorized Signature

Company Name

Typed or Printed Name

Title

Date

Telephone Number

Email



ATTACHMENT G
LOBBYING CERTIFICATION

The undersigned certifies, to the best of his or her knowledge and belief that:

1. No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or an employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress an officer or employee of Congress or an employee of a member of Congress in connection with this federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub awards at all tiers (including subcontracts, sub grants, and contracts under grants, loans, and cooperative agreements) and that all sub recipients shall certify and disclose accordingly.

This certification is a material representation of the fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Authorized Signature

Company Name

Typed or Printed Name

Title

Telephone Number

Email



ATTACHMENT H DEVIATION FORM

All deviations to this RFP must be noted on this sheet. In the absence of any entry on this Deviation Form, the prospective Vendor assures LifePath Systems of their full agreement and compliance with the Specifications and Terms and Conditions.

Each response to this RFP shall contain a Deviation Form, which states the prospective Vendor’s commitment to the provisions of the RFP. An individual authorized to execute contracts must sign the Deviation Form. Any exceptions taken to the terms and conditions identified in this Proposal must be expressly stated in the Deviation Form. Use an additional copy or page if needed.

THIS DEVIATION FORM MUST BE SIGNED AND SUBMITTED WITH THE RFP BY EACH PROSPECTIVE VENDOR/CONTRACTOR WHETHER THERE ARE DEVIATIONS LISTED OR NOT. IF NO DEVIATIONS, NOTE: NONE

Reference Specifications, Terms and Conditions and Page Number	Deviation

Authorized Signature

Company Name

Typed or Printed Name

Title

Telephone Number

Email



NOTICE "NOT TO PARTICIPATE" FORM

Dear Vendor:

Please check the appropriate box below, complete the remainder of this form and return it PRIOR to the scheduled due date and time on the Proposal.

- Our Company cannot provide the products, supplies and/or services listed in this request. Please MOVE our name and address to the following services so that we may submit bids/proposal at a later date:

Services:

- Our Company has chosen NOT to submit a Proposal at this time but would like to remain on your list for this Proposal category. We did not submit a Proposal because:

Reason:

- Please REMOVE our Company name from all LifePath Systems lists until further notice.

Company Name: _____

Representative: _____ Title: _____

Address: _____ Phone: _____

Email: _____ Other: _____



Authorized Signature: _____

Title: _____ Date: _____

VENDORS WHO RESPOND TO THIS INVITATION WITH A COMPLETED PROPOSAL FORM WILL REMAIN ON OUR MAILING LIST. VENDORS MAKING NO RESPONSE MAY BE REMOVED FROM THE MAILING LIST.

PLEASE RETURN THIS FORM ONLY TO:

LifePath Systems
Attn: Angela James
1515 Heritage Drive
McKinney, TX 75069

Notice "Not to Participate" RFP # 0139 SENIOR LEADERSHIP DEVELOPMENT