

Request for Proposals
KIPDA Regional Planning & Development Agency
Accounting/Human Resources Software
RFP #KIPDA -2025-1

May 18, 2025



**Kentuckiana
Regional Planning &
Development Agency**

This page is left intentionally blank.

Table of Contents

Overview & Statement of Intent	5
General Instructions.....	6
Submission of Proposal	6
General Proposal Information	6
Communication concerning the RFP and Proposals.....	6
Schedule of Proposal Evaluation & Award	7
Proposal Amendment & Rules for Withdrawal	7
Contract Terms	8
Contract Duration	8
Contract Negotiations	8
Assignments & Subcontracting	8
Independent Price Determination	8
Contractor Exceptions to the RFP	8
Title VI/Disadvantaged Business Enterprises	8
Proposal Evaluation	9
Proposal Format & Requirements	10
Organization Information & Staff Qualifications (10 points)	10
Experience (20 points).....	10
Implementation (20 points)	11
Ongoing Licensing and Maintenance (20 points).....	11
Customer Service and Training (10 points)	12
All Inclusive Software (no third-party vendor used) (20 points).....	12

This page is left intentionally blank.

Overview & Statement of Intent

The Kentuckiana Regional Planning and Development Agency, hereinafter referred to as KIPDA, intends to contract with a vendor to provide professional integrated technology services to manage the budget, accounts receivable, accounts payable, financial reporting, human resources and payroll management.

KIPDA is one of 15 Area Development Districts in the State of Kentucky providing regional planning and development. KIPDA was formed by interstate compact under laws of Kentucky and Indiana for the purpose of civic improvements and economic development within the nine county regions in Kentucky and Southern Indiana. KIPDA is a voluntary association of local governments funded by contributions from member cities and counties, federal and state grant awards and contracts for services. The KIPDA region consists of the Kentucky counties, Bullitt Jefferson, Shelby, Spencer, Oldham, Trimble and Henry and the Indiana counties of Clark and Floyd. KIPDA coordinates planning and development activities for this region and provides assistance, with the implementation of local, state and federal programs that address community development, planning and quality of life projects. KIPDA's annual revenue for FY2025 is approximately \$34 million and the agency employs approximately 90 individuals, who administer and perform services for a variety of state and federal programs. Through its partnership with the Kentucky Department of Local Government (DLG), KIPDA is an effective conduit of information and communication between DLG, its state cognizant agency and the local units of government within the KIPDA region.

KIPDA operates on an accrual basis, with a fiscal year beginning July 1 and ending June 30. KIPDA receives funding from various local, state and federal government agencies for the administration and completion of specific scopes of work. KIPDA prepares an annual cost allocation plan to assign direct and shared cost to each grant, project and program. The allocation plan is submitted to our funders annually. KIPDA utilizes numerous projects/programs and one cost pool that allocates shared cost to each program. Additionally, there are three pools to distribute shared divisional costs.

KIPDA is governed by its Board of Directors, which is comprised of locally elected officials and appointees. The Executive Director is responsible for the daily operations of the organization.

General Instructions

Submission of Proposal

The proposal is to be submitted electronically via email in PDF form to Freida Winkfield Shaw **no later than 12:00 p.m. noon EST on Friday, July 18, 2025**. The email shall have "Proposal in Response to RFP #KIPDA 2025-1 DO NOT OPEN" in the subject line. The proposal in PDF format shall not exceed five (5) MB. Proposals submitted via fax will not be accepted.

General Proposal Information

Please note that upon the completion of the review and evaluation of all proposals submitted in response to this RFP, all proposals shall become public documents of KIPDA and shall be open for review by the public.

KIPDA reserves the right to accept or reject all proposals. All costs incurred by the proposers in preparing their proposals shall be the responsibility of the proposers.

Communication concerning the RFP and Proposals

All communication in specific reference to this RFP shall be emailed to Freida Winkfield Shaw (Freida.WinkfieldShaw@kipda.org) and should reference RFP #KIPDA 2025-1. KIPDA will not accept phone calls or faxes for clarifications and shall only be bound by written responses for questions concerning the RFP submitted by the proposer via email. **The deadline for the submittal of questions is Monday, June 16, 2025.** Responses to all questions submitted will be compiled and placed on the KIPDA website at this address: <https://www.kipda.org/about/rfps-rfqs/> no later than Monday, June 30, 2025.

Only written responses to written questions will be considered official. These responses will be included in the RFP thereby as an amendment and available for review at <https://www.kipda.org/about/rfps-rfqs/> no later than Monday, June 30, 2025.

Names of vendors submitting questions will not be disclosed in the written responses. Proposers shall respond to the RFP and its associated addenda and amendments.

Schedule of Proposal Evaluation & Award

RFP is available	May 18, 2025
Deadline for questions from potential proposers	June 16, 2025
KIPDA places responses to all questions received on KIPDA website	June 30, 2025
Proposals are submitted to KIPDA	July 18, 2025
KIPDA completes the evaluation and notifies top candidates for presentation	July 31, 2025
Presentations to KIPDA staff/evaluation committee	August 4-15, 2025
KIPDA awards contract/contract signing	August 29, 2025
Effective date of contract	Sept 1, 2025

NOTE: KIPDA reserves the right to adjust this schedule as it deems necessary.

Proposal Amendment & Rules for Withdrawal

Prior to the proposal due date, a submitted proposal may be withdrawn by submitting a written request for its withdrawal to KIPDA signed by the proposer and mailed to Freida Winkfield Shaw in reference to RFP #KIPDA 2025-1. KIPDA shall not accept any amendments, revisions, or alterations to the proposal after the proposal due date unless formally requested in writing by KIPDA.

Contract Terms

Contract Duration

KIPDA intends to enter a contract subject to the availability of government funds. KIPDA reserves the right to extend the contract on an annual basis, upon reasonable and satisfactory performance.

Contract Negotiations

KIPDA reserves the right to further clarify and/or negotiate with the best evaluated proposer, subsequent to award recommendation but prior to contract execution, if such is deemed necessary at the discretion of KIPDA.

Assignments & Subcontracting

The proposer must clearly identify in the proposal any intended subcontracts, the scope of work to be subcontracted, and the name(s) of any potential subcontractor(s). All subcontracts require KIPDA's prior approval. The execution of any subcontract(s) by the proposer (prime contractor) shall not relieve said proposer from any contractual obligation to KIPDA.

Independent Price Determination

A proposer shall not be considered for award if the price in the proposal was not arrived at independently without collusion, consultation, communication, or agreement as to any matter relating to such prices with any other proposers or with any competitor. In addition, the proposer is prohibited from submitting more than one proposal or submitting multiple proposals in different form; (i.e., as a prime proposer and as a subcontractor to another prime proposer. Alternate proposals shall result in the disqualification of the proposer.

Should any such action stated above be detected any time during the Contract, the Contract shall be deemed null and void.

Contractor Exceptions to the RFP

If a proposer has an exception to the scope of services, is unable to provide a listed service or any requested information, or objects to any of the terms and conditions listed in the RFP, the proposal may be deemed non-responsive.

Title VI/Disadvantaged Business Enterprises

KIPDA, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49 Code of Federal Regulations, Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally-assisted programs issued pursuant to such Act, hereby notifies respondents that it will affirmatively ensure that in any contract entered into pursuant to this

advertisement, disadvantaged business enterprises will be afforded full opportunity to submit letters of interest in response to this invitation and that such businesses are afforded the opportunity to participate as sub-consultants. KIPDA will not discriminate against any respondent on the grounds of race, color, sex, or national origin in consideration for an award.

Proposal Evaluation

The following is a list of the major topic areas required for the proposal. Each topic area shall be evaluated by a selection committee and awarded points based upon the appropriateness, organization, completeness, and quality of your proposal.

TOPIC AREA	POINTS
Organization Size & Staff Qualifications	10
Experience	20
Implementation	20
Ongoing Maintenance & Licensing	20
Customer Service & Training	10
All-inclusive software (no third-party vendor used)	20
TOTAL POSSIBLE POINTS	100

In addition to the above evaluation criteria, the selection committee may require the top proposers to provide a presentation of their proposal and their ability to meet KIPDA's stated needs. Each proposer will be allotted approximately 30 minutes, but no more than 60 minutes for their presentation, including questions. A maximum of 5 additional points may be added to the total score after the presentations. The proposer with the highest total point value will be recommended for the contract award.

Proposal Format & Requirements

The proposal must address all portions of the RFP as set forth herein; however, proposers may retype and/or otherwise duplicate the forms/questions for proposal submission, provided the revised format includes all the information required by KIPDA as specified in the RFP.

Organization Information & Staff Qualifications (10 points)

1. Provide the organizational history of the company, such as years in business, location of office or offices, form of business (i.e., sole proprietorship, partnership, corporation), etc.
2. Has the company and/or any of the company's employees, agents, independent contractors, and/or proposed subcontractors been convicted of, plead guilty to, or pled nolo contendere to any contract crime involving a public contract? YES or NO
 - a. If YES, attach an explanation.
3. Has the company been in a contractual relationship with KIPDA before? YES or NO
 - a. If YES, provide the following information:
 - i. Contract Number
 - ii. Term of Contract
 - iii. Division of KIPDA
4. Attach a copy of a valid certificate of insurance indicating liability insurance and the amount of liability insurance the company carries.
5. Include a brief description of the qualifications and experience of each key member of the organization who will be assigned to perform duties and/or services under the contract. The following information should be included in these descriptions:
 - a. Education
 - b. Current position and responsibilities within the organization
 - c. Relevant work experience (number of years, type of experience, description of job duties for each position held)
6. Provide information of existing work commitments of the company and the estimated start date for this project based on current commitments.

Experience (20 points)

1. Provide three (3) projects undertaken by the company (other than KIPDA) which demonstrate competence in delivering the services described herein. The three should also include the following information:
 - a. Organization Name
 - b. Description of Services Provided
 - c. Contact Person and Telephone Number
 - d. Website Address of the Completed Project
2. List any other relevant work experience and references, including KIPDA.

Implementation (20 points)

Provide a concise yet thorough description of your capabilities and plans for accomplishing the requirements.

Emphasis should be placed on completeness and clarity of content. The information presented should be in enough detail to enable the selection committee to ascertain your understanding of the types of work requested and should essentially outline the method or methods through which the requested services will be provided. A description of how the project will be managed, including associated costs, should include the following:

- A matrix of the project outlining each phase, including a description of the methodology (tasks, staff meetings, etc.), timeframe for completion (anticipated start date and duration), deliverables, needed resources (including data, staff, technology or technologies, associated costs, functionality, and percentage of total project completion).
- Any other requirements needed for implementation.
- A list and description of the maintenance agreement and support, including any warranties that the company will provide in the short and long term.
- A plan for any needed technology documentation and a schedule of training for KIPDA staff.
- A description of the licensing arrangement, including the number of licenses and any restrictions to users outside of KIPDA.

Ongoing Licensing and Maintenance (20 points)

Provide a concise yet thorough description of your capabilities and plans for accomplishing the ongoing licensing and maintenance requirements.

Emphasis should be placed on completeness and clarity of content. The information presented should be in enough detail to enable the selection committee to ascertain your understanding of the types of licensing and maintenance required following the completion of the implementation phase of the project. The information should essentially outline the method or methods through which the requested services will be provided. A description of how the project will be managed following completion on an annual basis, including associated costs, should include the following:

- A matrix of the project outlining ongoing maintenance and licensing services, including a description of what services are provided as a result of the licensing and maintenance agreements, timeframe for completion (anticipated start date and duration), deliverables, needed resources (including data, staff, technology or technologies, associated costs, functionality, etc..)
- Any other requirements needed.
- A list and description of the maintenance agreement and support, including any warranties that the company will provide in the short and long term.
- A plan for any needed technology documentation.

- A description of the licensing arrangement, including the number of licenses and any restrictions to users outside of KIPDA.
- Description of the arrangement if KIPDA were to purchase and own the source code.

Proposers must bid labor rates, software, licensing, and the option to purchase and own the source code, as stated below. In the event the categories used by the proposer are not the same as those listed herein, the proposer may create categories to correspond to those listed. Labor costs should include project management, data conversion, support services, installation, testing, and training.

Category	Rate	Total Hours	Cost
Project Manager	\$		\$
Programmer	\$		\$
Clerical	\$		\$
Software	\$		\$
Licensing	\$		\$
Source code Ownership	\$		\$
Other (please specify)	\$		\$
TOTAL PHASE COSTS			\$

Customer Service and Training (10 points)

Describe how the organization plans to respond to calls for assistance effectively and provide adequate training to KIPDA employees. Describe how the organization plans to support KIPDA while utilizing the software. Be sure to include service hours and contact methods. Describe what methods will be used to train KIPDA staff. Describe how KIPDA will be notified or trained (if applicable) on future revisions and updates to the software.

All Inclusive Software (no third-party vendor used) (20 points)

Describe how the accounting platform streamlines financial management by offering a fund accounting system, that includes budget, accounts receivable, accounts payable, financial reporting, human resources and payroll management features. Explain how the modules are built into the core platform, eliminating the need for third-party vendors and streamlining financial processes.