

DATE: 2/02/2016

INVITATION TO BID  
THIS IS NOT AN ORDER

Page: 4

BID NO.: 50-00115546

**JEFFERSON PARISH**

PURCHASING DEPARTMENT  
P.O. BOX 9  
GRETN, LA. 70054-0009  
504-364-2678

VENDOR: Castle Branch Inc.

BUYER: LFRANCIS

As per LSA-RS 47:301 et seq., all governmental bodies are excluded from payment of sales taxes to any Louisiana taxing body. Quotations shall be based on F.O.B. Agency warehouse or jobsite, anywhere within the Parish as designated by the Purchasing Department.

JEFFERSON PARISH reserves the right to cancel all or any part of an order if not shipped promptly. No charges will be allowed for parking or cartage unless specified in quotation. The order must not be filled at a higher price than quoted. JEFFERSON PARISH reserves the right to cancel at any time and for any reason by issuing a THIRTY (30) day written notice to the contractor.

JEFFERSON PARISH is expecting all products to be new and all work is to be done in a workman-like manner, according to standard practices. Any deviations or alterations from the specifications must be indicated and backup documentation supplied with your quotation.

**DELIVERY: FOB JEFFERSON PARISH**

INDICATE DELIVERY DATE ON EQUIPMENT AND SUPPLIES N/A

INDICATE STARTING TIME (IN DAYS) FOR CONSTRUCTION WORK N/A

INDICATE COMPLETION TIME (IN DAYS) FOR CONSTRUCTION WORK N/A

In the event that addenda are issued with this bid, bidders MUST acknowledge all addenda on the bid form. Bidder must acknowledge receipt of an addendum on the bid form as indicated. Failure to acknowledge any addendum on the bid form will result in bid rejection.

Acknowledge Receipt of Addenda: NUMBER: 1

NUMBER: \_\_\_\_\_

NUMBER: \_\_\_\_\_

NUMBER: \_\_\_\_\_

LOUISIANA CONTRACTOR'S LICENSE NO.: (if applicable) \_\_\_\_\_

<b>*** ALL BIDDERS MUST COMPLETE SECTION BELOW ***</b>	
FIRM NAME: Castle Branch Inc.	
SIGNATURE: (Must be signed here)	TITLE: Chief Financial Officer
PRINT OR TYPE NAME: Lauren Henderson	
ADDRESS: 1844 Sir Tyler Drive	
CITY, STATE: Wilmington, NC	ZIP: 28405
TELEPHONE: (888)723-4263	FAX: (910)772-1528
EMAIL ADDRESS: rfp@castlebranch.com	

TOTAL PRICE OF ALL BID ITEMS: \$ 8,468.00

## INVITATION TO BID FROM JEFFERSON PARISH - continued

BID NO.: 50-00115546

SEALED BID

ITEM NUMBER	QUANTITY	U/M	DESCRIPTION OF ARTICLES	UNIT PRICE QUOTED	TOTALS
1	580.00	EA	<p><b>EMPLOYMENT BACKGROUND CHECK FOR THE JEFFERSON PARISH DEPARTMENT OF PARKS AND RECREATION</b></p> <p><b>0100 Employment Background Check</b></p> <p>Two Year Contract to provide All-in-One Paperless Screening Solution for background checks. Vendor must provide comprehensive national background check service, that includes national criminal database search, national sex offender check, SSN identity check, and address history, plus a complete re-verification of all criminal hits. Vendor must provide Jefferson Parish Parks and Recreation an online screening account to background check status, order and view reports, communicate with support staff, and view billing.</p> <p>Vendor is required to verify the accuracy for all criminal record hits and verify that they belong to applicant, including up-to-date sentencing, description of charges and dispositions (guilty/not guilty). Vendor is required to have 24/7 internet access to files. Vendor is required to have offsite data backups to a secure location. System updates, system maintenance, training and technical support shall be included with cost.</p> <p>All resulting records, reports, and documents shall be the sole property of Jefferson Parish and shall be giving to Jefferson Parish by the firm upon request.</p> <p>Please Contact Antoinette Holmes at (504) 736-6999 ext. 208</p>	\$14.60	\$8,468.00



## Scope of Services

### Comprehensive National Background Check Services

CastleBranch will provide comprehensive national background check services by utilizing the following searches:

**National Record Indicator:** The National Record Indicator (NRI) product searches a proprietary database containing over 200 million records from multiple jurisdictions. Sources include state court repositories, departments of correction, county courts and other state level agencies, as well as sex and violent offender records from all 50 states. If there are any hits found in the NRI, individual counties are searched to confirm records and ensure compliance with Section 613 of the FCRA. By confirming hits against original county courthouse records, CastleBranch is able to provide the most accurate and up-to-date information available.

**County/Parish Criminal History:** A county criminal history check reveals felony and misdemeanor convictions and charges as well as any pending charges for a single county. According to FCRA regulations, the standard scope for background checks is seven years. Older convictions provided by the county will be indicated on the background screening report. A county criminal history check begins with a residency history trace. Once all counties of residence have been identified, each of the courthouses within those counties are searched directly.

**Social Security Alert:** A Social Security number alert reveals if a Social Security number is valid and uniquely associated with an applicant. The trace will also report if multiple names are associated with a particular Social Security number. This search is conducted by analyzing a database that compiles information from various sources such as voting records, mailing lists, credit history, address information, magazine subscriptions and property records.

**Residency History:** A residential history compiles information from various sources to arrive at a list of names and addresses associated with a specific Social Security number. These current and previous addresses establish a basis for an applicant's criminal history search.

### Placing Orders and Viewing Results

CastleBranch will provide Jefferson Parish Parks and Recreation access to our proprietary Administrator Portal (AP) system, a secure, online system through which background investigation orders are placed, monitored and reviewed. Accessible 24 hours a day, seven days a week, AP is highly flexible and will be tailored to meet the unique needs of Jefferson Parish. AP is capable of creating custom reports, modifying search qualifiers and providing multiple accounts for tracking and invoicing purposes.

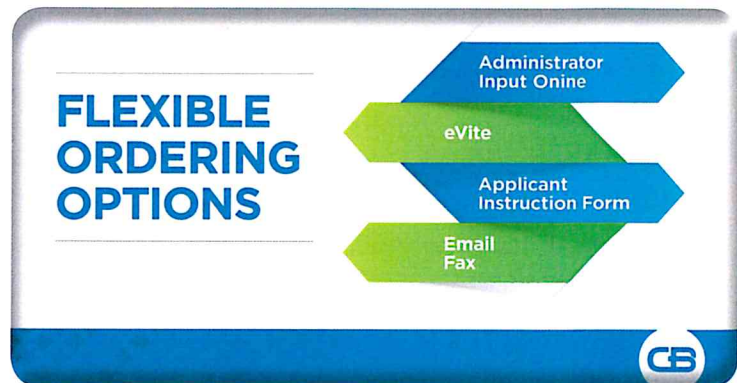
Our user-friendly applications utilize state-of-the-art technology to ensure Jefferson Parish benefits from fast and accurate background investigation results.



Jefferson Parish can submit orders using one of the following online options:

#### eVite

An eVite is an emailed invitation that instructs applicants how to place their own background screening orders. The eVite directs the applicant to [www.CastleBranch.com](http://www.CastleBranch.com), where he or she will log into our order system. The applicant is prompted to provide all relevant personal information to complete the order.



#### Client Input

Authorized users at Jefferson Parish can request services by visiting [www.CastleBranch.com](http://www.CastleBranch.com), where they can place an order on the applicant's behalf. Users will choose from a customized list of options or select from an array of à la carte searches.

The background investigation will begin once an order is placed. AP allows authorized users within Jefferson Parish to view and monitor any orders placed for background investigations, providing data as it's received in real time on completed results as well as partial results.

Jefferson Parish users can be kept advised of a report's status through AP's roster feature. The roster keeps track of all active and inactive applicants and is automatically sorted into identifying categories such as complete, clear / compliant, hits, in process and more. These tabs give authorized users a high-level overview of the status of all applicants.



Once a background investigation is completed, our system allows applicants and clients to access an electronic PDF copy of the certified report. Applicants are provided instructions to access their electronic results via our secure system. Clients can view these reports through AP. Clients will receive email notifications as background screening reports are completed and available via AP or as partial results are returned, upon request.

Within AP, CastleBranch has created a useful selection of tools to further enhance the background screening process.

Additional reporting tools accessible through AP include:

#### Record Scan




This service saves administrators time and effort by providing an intuitive visual key indicating the report status. CastleBranch researchers scan all background investigation results and alert clients of their statuses using one of two easily-identifiable symbols.

Record Scan	
	Order passes: no records found
	Records or errors found; further action/review needed

Complete reports are available to view through AP.

### Extensive Review

CastleBranch will review background screening results and identify if a report passes, requires further review or fails to meet a client's specified criteria. During system setup, clients can predefine rules related to certain felony and misdemeanor charges and convictions. If an applicant's record contains one of the predefined offenses, the applicant automatically fails and a red "X" displays as the status indicator. This feature, available for an additional charge, allows administrators to immediately dismiss failing applicants without having to spend additional resources to personally review the record.

Extensive Review	
	Order passes client's specified criteria
	Records or errors found; client should review results
	Order fails the client's specified criteria

### Billing and Invoicing:

CastleBranch offers multilayered billing in which a master account is created, followed by sub accounts that can represent a different departments or locations within an organization. Each entity is then assigned a unique Client Accounting Code (CAC) to differentiate an order's origination.

Our accounting department will generate a detailed invoice each month showing the total number of investigations and total cost of services performed under each CAC. A grand total will appear under the master account. Invoices can be emailed in PDF format for electronic viewing.

Also included is a list of applicants showing each item associated with that individual, any additional items that may have been added by the individual who placed the order, as well as the price for those individual items.

### Quality Assurance and Accuracy Verification:

CastleBranch's quality assurance department continuously audits all staff conducting employment screening searches to ensure accuracy and regulatory compliance.

In addition to monitoring our researchers' work, our quality assurance department continuously investigates the best sources available to uncover our search data. If a better source is discovered, CastleBranch will take every step necessary to utilize the new source. Each new source is tested for accuracy and checked for regulatory compliance before implementation. Sources are also tested regularly throughout their use to ensure continued accuracy and compliance.



CastleBranch has detailed search procedures in place to ensure compliance with the Fair Credit Reporting Act (FCRA). After researchers complete the initial background screening search, our quality assurance specialists review all data to ensure accuracy and compliance with FCRA rules and regulations. CastleBranch only collects applicant data necessary to provide the requested services, and such data is only processed with the applicant's knowledge and authorization.

Further, CastleBranch's operational management team and several employees within the department have received their basic and advanced certification credentials through the NAPBS FCRA compliance program.

In 2015, our training and quality assurance efforts resulted in a 99.94 percent accuracy rate for all returned background screening data.

### **Customer Service and Training:**

CastleBranch's client core team and a client experience specialist will schedule and conduct staff training. This service is free of charge, and our team will conduct as many training sessions as needed to ensure your staff fully understands how to navigate and use our system.

The client experience team also offers multiple training resources to new clients during and following the implementation period. Webinars are available for clients to see the applicant- and client-based websites in use. Demo accounts are also available as new client users are added, allowing users a hands-on experience with the CastleBranch systems.

Client experience specialists will offer one of two training options: Train the Trainer or Train the User. A standard training session is one-to-two hours. During training, client experience specialists will:

- Provide online demonstrations on how to process an order, view returns and create management reports
- Explain the purpose of My Library and how to access important documents, including FCRA and state regulations housed there
- Provide all written user documentation
- Demonstrate how to create standard and ad hoc reports
- Define data elements necessary for custom reports
- Review FCRA regulations related to the consumer reporting industry

As your agency hires additional staff, CastleBranch will conduct new hire or refresher training as part of your inclusive, price-guaranteed agreement. A useful tool in this instance is recorded training sessions. Furthermore, authorized users will always be kept apprised of any product changes or updates to laws regulating the background screening industry via AP and through email, if requested. If necessary, sales and client solutions team members are also available for in-person meetings.

Additionally, CastleBranch will provide Jefferson Parish with useful articles, documents, forms and instructions located in the AP client library. These documents are available online 24 hours a day, seven days a week and contain information pertaining to state and FCRA regulations, the definitions of commonly used abbreviations and more.

Our client experience specialists are available to assist Jefferson Parish Monday through Friday from 8 a.m. - 8 p.m. EST. Client experience specialists can be reached via email or at our toll-free number by calling 888-723-4263.

**Offsite Data Backups:**

CastleBranch's off-site backup system contains essential databases, websites and file systems. Data is backed up incrementally throughout the day. Full backups are created each week. Backups to off-site locations sent over the Internet must use AES or better encryption while in transit. If OpenSSH is used to satisfy this requirement, ssh keys must be used instead of passwords for initiating connection for transferring backups.

As a consumer reporting agency that abides by the rules and regulations set forth by the FCRA and NAPBS, CastleBranch only collects and processes personally identifiable information (PII) with the applicant's knowledge and authorization. CastleBranch follows set procedures to ensure PII is handled in a secure manner.



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**Central Bidding Time:** Thu February 18, 2016 11:22:18 AM GMT-6

Place a Bid for 5000115546 - TWO YEAR CONTRACT FOR EMPLOYMENT BACKGROUND CHECK FOR THE JEFFERSON PARISH DEPARTMENT OF PARK AND RECREATION

Please enter your best bid proposal for this project

Louisiana Contractor ID#

Enter all information required on the outside of the sealed envelope in the box below

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Castle Branch Inc.  
1844 Sir Tyler Drive  
Wilmington, NC 28405

Jefferson Parish  
ITB No. 50-00115546  
Two Year Contract for Employment Background Check for the Jefferson Parish Department of Parks and Recreation  
Opening Date: February 17, 2016 at 11 a.m.

Bid Bond #

Jefferson Parish Vendor #:

Upload Attachment(s)

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