



September 19, 2022

## Proposal for:

RFP-731-22-038-KV  
Small Business Advisor for Abilene Texas

## Proposal to:

Kari Vander Wege  
Texas Woman's University  
P.O. Box 425528 Denton, TX 76204  
940-898-3748, [twubids@twu.edu](mailto:twubids@twu.edu)

## Proposal from:

Keocia Services, LLC  
450 Century Parkway, Suite 250  
Allen, TX 75013  
214-295-2644, email [info@keociaservices.com](mailto:info@keociaservices.com)  
Website: [keociaservices.com](http://keociaservices.com)

UEI: QDAWKKC5JGM7  
CAGE CODE: 97HU5  
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CERTIFIED: EDWOSB, WOSB, M/WBE

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# Introduction

Keosha Services, LLC submits this proposal in response to RFP-731-22-038-KV Small Business Advisor for Abilene Texas with the intent of providing the most competitive quality of service and pricing. We have “full knowledge of the scope, nature, quality, and quantity of the work to be performed, the detailed requirements of the Services to be provided, and the conditions under which the Services are to be performed.”

We offer extensive experience in the fields of:

- Education,
- Nutrition,
- Arts and Sciences,
- Nursing and Health Care, and
- Women and Minorities in Small Business.

Keocia Services, LLC/Keocia Perry certify that it/she:

- Has been in business 3-plus years as a small business owner.
- Has over 2-plus years' experience as a small business advisor.
- Delivers advisory skills directed toward accessing capital through all channels.
- Has B.S degree.
- Is familiar with Abilene area business support organizations, and is an active member of --
  - North Central Texas Regional Certification Agency (nctra), and
  - Dallas Minority Business Development Agency (dmbnsdallas).
- Has experience with incubator/accelerator programs.
- Has experience with SBDC, VBOC or other SBA advising.

## **Our mission statement –**

To advance racial fairness and support marginalized communities, we provide priority to minority business enterprises (MBEs). We give innovative resources to government agencies in the form of solutions and assistance in obtaining government contracts for small enterprises. We are effective at changing lives.

## **Is proudly in alignment with Texas Woman's University's (TWU's) –**

Texas Woman's University cultivates engaged leaders and global citizens by leveraging its historical strengths in health, liberal arts, and education and its standing as the nation's largest public university primarily for women. Committed to transformational learning, discovery, and service in an inclusive environment that embraces diversity, Texas Woman's inspires excellence and a pioneering spirit.

Keosha Services, LLC certifies that it is:

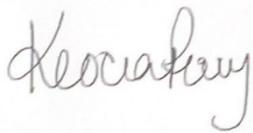
- Prepared to dedicate its best advisors for the full year of contract.
- Designated as –
  - NCTRA Minority Business Enterprise,
  - NCTRA Women Business Enterprise,
  - NCTRA Small Business Enterprise,
  - DBE,
  - ACDBE,
  - EDWOSB, and
  - TX HUB.
- Our key and relevant areas of knowledge transfer expertise are –
  - Communication,
  - Cultural Climate Studies,
  - Diversity/Inclusion,
  - EQi2.0 and 360 – Emotional Intelligence,
  - Ethics,
  - Executive Coaching,
  - Financial Management,
  - Leadership,
  - Needs Assessment,
  - Professional Development,
  - Soft Skills Training, and
  - Technology (IT).
- Including all components of 2.3.1 in this proposal.
- In 100% compliance with all the requirements, sections, and sub-sections of the proposal and will be with the awarded contract.
- Available for oral interviews/presentations.
- Willing to make a Best and Final Offer (BAFO).

Keocia Services, LLC warrants that:

- For consistency with clients, only one person, Keocia Perry, will advise.
- Ms. Perry will facilitate the 15-week AccelerateHER training program and provide small business advising for the course of one year at the Domain Abilene.
- Her program will include a variety of financial/business management advisement, and technical assistance.
- It will assist small businesses with problem solving activities for growth and expansion, innovation, increased productivity, and management improvement.
- It will also maintain current knowledge and information regarding federal, state, and local regulations that affect small business and counsel on methods of compliance.

- She will update client relationship management (CRM) with recap of all small business advising sessions.
- Maintain strict confidentiality of clients, companies, and Center for Women Entrepreneurs (CWE) programming.

TWU's contact point for this RFP proposal and contract award, and the representative of the Proposer who is legally authorized to bind the Proposer to the terms and conditions contained in this RFP and to compliance with the information submitted in the Proposal is:



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Signature

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9/17/22

Date

Keocia Perry, Founder and Manager of Keocia Services, LLC



# Background of the Proposer

Keocia Services, LLC's founder's vision is to: "dismantle the barriers to diversity in the business world." To that end, she has, for over a decade, been helping educate her regional and cultural community on financial freedom and entrepreneurship. She developed the agency first and foremost to help small businesses succeed in the government, private, and non-profit sectors. Ms. Perry has over 12 years of expertise in the financial industry, including banking, insurance, and entrepreneurship. She is a professional trainer and consultant with a broad accounting, auditing, and finance background. Before founding Keocia Services LLC, Ms. Perry's work experience included JP Morgan Chase and Santander USA.

In addition to conducting her training seminars, Ms. Perry frequently conducts training for other associations and small businesses. Her experience includes audit management, information systems, financial and operational auditing, financial reporting, consulting, training, and organization directorship. Ms. Perry has trained over 200 accounting, auditing, information systems, customer service, and purchasing professionals.

She and her core team – including Rachael Collins, Training Coordinator, and Tyler Mix, Project Manager – have an extensive network of small business advisors they hire on to fulfill the small business consulting needs of clients. They collaborate with businesses that carry out tasks including startup, procurement, and professional development services.

They provide companies with highly engaging, performance-based, and learner-centered team member training and development programs. Customer service training, call center training, public speaking, creative problem solving, servant leadership, teamwork and team building, employee safety training, accident investigation, and numerous leadership development courses are just a few topics covered in their consulting, training sessions, seminars, and workshops. They also offer procurement, logistics, and academic training.

## Keocia Perry's Work and Academic Profile

Ms. Perry prides her company and herself:

- On ensuring a positive customer experience.
- Having Strategic Partnerships with Staffing, Cloud, Software, and Hardware entities.
- Being Agile, Innovative, and Quick to Pivot.
- Offering Value-based pricing.
- Delivering Five-star Leadership Training

## PROFESSIONAL EXPERIENCE

### NOVEMBER 2019 – PRESENT: MANAGER KEOCIA SERVICES LLC

- Establishes policies and internal controls including a Manual of Procedures to ensure integrity and consistency of decision making and approvals.
- Provides administrative support and services to consumer clients and businesses.
- Oversees executive leadership, company training, and public relations with media.
- Supervises a staff of five independent contractors.
- Monitors and enhances procedures regularly to maintain quality assurance.
- Assists with businesses in development.
- Manages everyday business tasks such as answering phones, sending emails, and creating financial documents for the business.
- Manages daily social media accounts and marketing.
- Creates digital courses and Electronic Books for business curriculum.
- Completes daily business operations.

### NOV 2020 – JUNE 2021: SR. LOAN PROCESSOR, ALTISOURCE

- Reviewed all loans and registrations for completeness and accuracy. Responsible for communicating and obtaining the Account Condition Letter (ACL) per Regulation B requirements.
- Acted as the main point of contact throughout the entire mortgage process, ensuring excellent levels of member service by providing guidance/advice/counsel on process, in a detailed and comprehensive manner.
- Determined initial potential for qualification by evaluating credit history, income levels and assets/liabilities; calculate debt- to-income and loan-to-value ratios.
- Restructured loan request and recommended for adverse action as needed.
- Was responsible for reviewing and addressing items involving credit, occupancy, and employment verifications and ordered verbal verifications of employment (VVOE) for payoff accounts.

### JULY 2019 – NOV 2020: AUTO ADJUSTER, KEMPER

- Took statements from insureds, claimants, and witnesses.
- Obtained and reviewed evidence, financial reports, and medical records.
- Investigated losses and identified coverage issues.
- Negotiated settlements with claimants and claimants' attorneys.

### OCTOBER 2017 – APRIL 2018: GOVERNMENT UNDERWRITER, SBA

- Interviewed SBA loan applicants for business and home loans.
- Assisted with disaster relief loans for Homes and Small Businesses.
- Analyzed financial statements and related data and performed cash flow analysis to determine credit worthiness of specific loan request and SBA eligibility.

- Completed loan applications, gathered financial information, and worked with customers throughout the application and closing process.
- Closed loans and disbursed funds.
- Navigated through Disaster Case Management System (DCMS).
- Once loan process was completed, worked with appropriate relationship manager to seamlessly hand off the customer relationship for ongoing management thereof.
- Obtained knowledge needed to develop and maintain awareness of the SBA (7a) Line of Business and Disaster loans.
- Developed deep knowledge of SBA SOPs, program eligibility, credit criteria and loan structure requirements

FEBURARY 2017 – OCTOBER 2017: SR. LOAN PROCESSOR, JP MORGAN CHASE

- Processed first and second mortgage applications.
- Exercised independent judgment to identify and resolve problems.
- Took initiative and worked independently with minimal supervision.
- Acquired extensive with Conventional, FHA, and VA loans.
- Developed thorough knowledge of Fannie Mae and Freddie Mac Guidelines.
- Gathered information for loan applications.
- Evaluated credit histories for applications.
- Collected data from clients such as their assets, salaries, debts, and employment status to fill in information for the loan application.
- Reviewed file documentation for missing or erroneous information.
- Met loan application deadlines.
- Assisted Loan Officer with requests and tasks needed to complete and process applications.

APRIL 2015 – FEBURAUY 2016: CREDIT ACCOUNT MANAGER, SANTANDER CONSUMER USA

- Performed Credit Exposure Monitoring: ensured transaction and collateral security remained within approval guidelines; documentation, covenant and financial compliance of the transaction/borrower.
- Was vigilant in maintaining portfolio of high-quality risk via timely borrower and portfolio reviews; identified potentially deteriorating risk situations and recommended remediation to ensure safety of bank's funds.
- Effectively analyzed credit applications utilizing the current Credit Guidelines and Practices and the Fair Isaac credit scoring model to provide a complete assessment of the applicant's credit risk.
- Made recommendations and credit decisions within approved credit authority.
- Maintained above average buying standards (quality and volume).
- Performed transactional analysis and proactively engaged to mitigate risks in the transaction.
- Supported the corporate credit manager.
- Gleaned working knowledge of financial statements and financial statement analysis.

- Developed metrics for management.

## EDUCATION

MAY 2016: B.S. ENTERTAINMENT BUSINESS, FULL SAIL UNIVERSITY

# Proposer's Responses to Questionnaire

Keocia Perry, LLC recognizes that in selecting a supplier, TWU will rely in part on the answers provided in response to this section. Accordingly, we certify that to the best of our knowledge, all responses are true, correct, and complete. TWU reserves the right to contact references or contact names listed below and shall be free from any liability to Keocia Perry, LLC for conducting such inquiry.

## 5.1

**Provide a summary of the Proposer's overall capabilities, recent and related experience, and expertise. Provide information on the Proposer's experience related to the scope of work outlined in this RFP, as well as its current workload, facilities, resources, and experience that clearly demonstrate its ability to successfully complete the work required within the constraints stated.**

Keocia Perry has experience in public speaking and business/professional development. In addition, she is a qualified trainer and consultant. One of her many loves is assisting the community in being financially independent and effective as entrepreneurs. We help small businesses grow and prosper in the public sphere. Including financial advice, business consulting, entrepreneurship, and insurance.

With over 12 years of experience in the financial sector, Ms. Perry also teaches and coaches organization leadership, managerial skills, business solutions, consulting, training, and leadership development. Through the training provided, many small business owners and staff have grown their companies rapidly and effectively.

Ms. Perry is also a certified credit repair and business credit specialist who has helped many clients reach their financial goals. Keocia Services is a registered Credit Services Organization in the state of Texas. Currently, Keocia Services' is focused on helping small business clients eight to 10 hours a week with technical assistance, business development, and business funding in weekly virtual one-on-one and group mentoring meetings.

## 5.2

**Provide a brief resume for each of the proposed key personnel, focusing on relevant experience, and list the assigned function of each key person as it relates to this RFP. Provide information related to previous projects. Also include a statement describing the Proposer's commitment of the individuals proposed to perform the requested services.**

See Background of the Proposer, Page 7.

### 5.3

**Provide the name and email address of a point-of-contact for the submitted proposal response. This point-of-contact will not be recognized as, or accepted in lieu of, the “Proposer Signature” requirements in Section 7 of this document.**

Point of Contact: Laglendra Hughes, info@keociaservices.com

### 5.4

**Provide a copy of your company’s audited financial statements if requested for the past two years.**

While not specifically requested in the RFP, audited financial statements available upon request at any time during the procurement process and/or contract.

### 5.5

**Provide a brief description of projects completed or commodities sold within the past five years. The projects or commodities should be similar to the scope of work or desired goods described in this RFP. Include, as applicable, project description and location or commodities sold, description of services or commodities provided, budget performance and schedule performance, key personnel involved, client name, contact name and phone number. Particular weight will be given to similar projects in higher education.**

#### Workforce Development Program – PRIME; No Subcontractors

Schedule of Performance: 01/2022- 06/2022

Client: Fast Freight Transport, LLC, Arlington, TX

Contact: Monica Green, CEO, 214-400-8102

Key Personnel: Keocia Perry, Head Advisor, Laglendra Hughes, Curriculum Developer

Budget Performance: \$32k

Type of contract: Professional Service

Tasks Performed:

- Assessed and developed policies and procedures
- Developed a strategy to take a company to market
- Developed and provided procedural and sales training staff
- Provided interim executive management

#### Business Development – PRIME; No Subcontractors

Schedule of Performance: 003/2022- Present

Client: White Bear and Associates, Desoto, TX

Contact: Quoren Whitebear, CEO, (469) 407-2251

Key Personnel: Keocia Perry, Principal Consultant

Budget Performance: \$30 per hour

Type of contract: Professional Service

Task Performed:

- Mapped Operational Processes
- Designed and Implemented Solutions for Process Optimization
- Implemented Budget Procedures
- Provided interim executive management
- Conducted Risk Analysis on Financial Processes and Procedures

## 5.6

**Provide three professional references (key contact names, titles, and telephone numbers) that have direct knowledge of your ability to provide the type of goods and/or services outlined in this RFP. Particular weight will be given to references provided in higher education.**

### Fast Freight, LLC

**Project Name:** Business Consulting, go-to-market and sales training, interim management

**Project Date:** 1/2022-6/2022

**Point of Contact:** Monica Green, CEO

**Email:** info@fastweighttransport.com

### WhiteBear & Associates

**Project Name:** Employee Self Development (Corporate Training)

**Project Date:** 03/2022-Present

**Point of Contact:** Qouren Whitebear

**Email:** quoren@whitebearandassociates.com

### Vinyl 2 Vinyl, LLC

**Project Name:** Paid and Free Course Creation Bootcamp(s)

**Project Date:** 11/2020-Present

**Point of Contact:** CEO: Mrs. Latasha Brooks

**Email:** contactus@latashabrooks.com

### Grand Covenant, LLC

**Project Name:** Business Consulting

**Project Date:** 08/12/2022-Present

**Point of Contact:** CEO: Markiest Smith

**Email:** info@grandcovenant.com

## 5.7

**Provide a list of any professional organizations the Proposer is a member of or actively involved with.**

Keocia Services LLC is an active member of the following professional organizations:

- North Central Texas Regional Certification Agency (nctra)
- Dallas Minority Business Development Agency (mbdadallas)

### 5.8

**Provide any details of all pending litigation or claims filed against your company in the past ten years that would negatively impact your company's performance under a Contract with TWU.**

Keocia Services, LLC has no current pending litigation or claims filed against our company in the past ten years.

### 5.9

**Provide a completed and signed W9 for your company.**

Please see Attachment A for the completed and signed company W-9.

### 5.10

**Is your company currently for sale or involved in any transaction to expand or to become acquired by another business entity? If yes, please explain the impact both in organizational and directional terms.**

Keocia Services, LLC is currently not for sale or involved in any transaction to expand or to become acquired by another business.

### 5.11

**Is your company currently in default on any loan Contract or financing Contract with any bank, financial institution, or other entity? If yes, specify date(s), details, circumstances, and prospects for resolution.**

Keocia Services, LLC is not in default on any loan contract or financing contract with any bank, financial institution, or other entity.

# Schedule of Costs and Fees

This 15-week “budget for this project is not to exceed \$52,000 or an hourly rate not to exceed \$25.00/hour for up to 40 hours per week. Billing shall be biweekly with detailed invoices describing the services rendered, the charges and the times when such services were performed, compensable expenses and the amount due.”

This is and **estimate only** based on two six-hour sessions per week in-person with the cohort and 10 hours of mentoring. The length of the sessions can be adjusted as well as the amount of mentoring. Furthermore, Ms. Perry is willing to add additional cohorts.

Week	Session Hours	Session Rate/Hour	Course Dev. Hours	Course Dev. Rate/Hour	Mentoring Hours	Mentoring Rate/Hour
1	6	\$22	6	\$23	10	\$24
2	6	\$22	6	\$23	10	\$24
3	6	\$22	6	\$23	10	\$24
4	6	\$22	6	\$23	10	\$24
5	6	\$22	6	\$23	10	\$24
6	6	\$22	6	\$23	10	\$24
7	6	\$22	6	\$23	10	\$24
8	6	\$22	6	\$23	10	\$24
9	6	\$22	6	\$23	10	\$24
10	6	\$22	6	\$23	10	\$24
11	6	\$22	6	\$23	10	\$24
12	6	\$22	6	\$23	10	\$24
13	6	\$22	6	\$23	10	\$24
14	6	\$22	6	\$23	10	\$24
15	6	\$22	6	\$23	10	\$24
<b>TOTALS</b>	90	\$1,980.00	90	\$2,070.00	150	\$3,600.00

\$23,340 for Supplies, Equipment, Commute TWU Abilene

The total of this **estimate** before negotiating number of hours required by the [Center for Women Entrepreneurs](#) (CWE) and the [AccelerateHER](#) training program, and number of cohorts for a Best and Final Offer (BAFO) is: **\$30,990.00**

# SOW, Including Program Overview

Keocia Services, LLC submits this program concept in direct response to: "The [Center for Women Entrepreneurs](#) is seeking a small business advisor in Abilene to oversee the 15-week [AccelerateHER](#) training program in person and provide Small Business Advising for one (1) year at the Domain Abilene. Advising services will be provided to the CWE (new and potential) clients, grant winners and the AccelerateHER cohort. The advisor will also market for new CWE clients to advise. The Advisor will work closely with the Statewide Program Manager at TWU - Center for Women Entrepreneurs in determining cohort weekly sessions, selecting the cohort, session dates and retaining speakers."

## Session and Programs Offered

Keocia Perry's passion is helping small businesses, especially start-ups, succeed. Once or twice weekly, Ms. Perry will meet with her AccelerateHER cohort to provide the following sessions as applicable to the cohort's business needs. She will also be available to them all and to each member of the cohort for group and individual mentoring. Her programs (which will solicit feedback from the cohort members for targeted relevance) may include, but are not limited to:

**Accounting:** Cohort members will examine the procedures and systems to accumulate, analyze, measure, and record financial transactions. Members will use recorded financial information to prepare a balance sheet, income statement, statement of cash flows, and statement of shareholders' equity to communicate the business entity's results of operations and financial position to users of financial information who are external to the company.

**Banking and Finance:** Cohort members will explore the dynamic, fast-paced world of money, shares, credit, and investments. Finance is an essential part of their economy as it provides liquidity in terms of money or assets required for individuals and businesses to invest in the future.

**Business Strategy Development:** Members will learn how to assess business strategies, create, and maintain competitive advantage, monitor industry evolution, and coordinate activities with organizational strategy.

**Engineering:** Cohort will focus on managing and optimizing business processes. They will become acquainted with business economics and the different functional domains in companies (i.e. accountancy, financial management, marketing, production, logistics, and human resources management). You will learn how a company operates daily and the organization of its processes.

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**Government Contracting:** There's never been a better time to get the training needed to become a qualified and competitive candidate for thousands of jobs in all government contracting and acquisition branches. Instruction provides a thorough working knowledge of:

- Contract Procedures,
- Laws and Regulations,
- Procurement,
- Government Contract Law,
- Performance-Based Contracting,
- Types of Contracts,
- and more.

**IT Solutions and Management:** Cohort will learn about innovations and their value, and how innovation should be managed and promoted to achieve maximum profits and the benefits it offers.

**Manufacturing:** Cohort members will gain knowledge and skills in the application, design, production, and assessment of products, services, and systems. and how those knowledge and skills are applied to manufacturing.

**Marketing:** Members will learn how to design a tailored plan while utilizing the same marketing strategies used by large corporations. This course will teach them how to use practical exercises and examples from real-world situations to learn cost-effective marketing techniques that provide results.

**Merchandising:** An introduction to the fundamentals of managing a retail location (on-site and online), members will get knowledge of the fundamentals of sales methods as well as the best strategies to market goods and interact with clients. The focus of this training is on customer retention and continuous improvement in product sales.

**Operations:** This course teaches how to create and update a business plan which includes cash flow, expenditures, and how to balance all these finances. It also teaches how to plan for a loss in business and how to recover and grow again.

**Outsourcing and Remote Work:** Cohort will receive resource information and step-by-step guides in setting up and managing outsourced and remote teams.

**Personnel Administration:** Members will learn how to plan training and professional development programs to increase staff knowledge and skills to serve the diverse population, including service to people with disabilities.

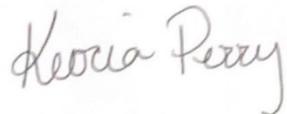
**Research and Development:** This program provides ideas, approaches, and resources for strategically planning technological advancements, managing core capabilities, and skillfully incorporating those advancements into current or potential global economic output. Additionally, it introduces the methods for managing and encouraging creativity at work.

**Sales:** Cohort will learn how to draw clients and finish deals to become a successful salesperson. Focuses on master lead generation, sales calls, and target market identification.

**Technology Exchange/Development:** A stimulating introduction to cutting-edge technologies that examines the effects on numerous businesses of technologies like machine learning (ML) and artificial intelligence (AI). Cohort will find that although technology does not pose a threat to the workforce, it does need that businesses develop procedures for integrating humans and robots. After completing this course, cohort will be able to:

- Analyze the development of disruptive technologies and their growth potential.
- Compare businesses using disruptive technology that were profitable and those that were not.
- Describe the present and upcoming uses of artificial intelligence (AI), deep learning (DL), and machine learning.
- And Much More

This proposal (pages cover through page 20) and its Notifications and Attachments A-C are hereby executed by Keocia Perry, Manager of Keocia Services, LLC:



Keocia Perry

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Signature

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9/17/22

Date

# Notifications and Attachments

## Insurance and Bonds (If Requested)

No bonds were requested at the time of release of and response to this RFP.

### 6.4.1 Insurance

Contractor agrees to maintain, at Contractor's sole expense, and provide proof of insurance meeting TWU's Third Party Insurance Standards ([www.twu.edu/media/documents/risk-management/TWU-Third-Party-Insurance-Standards.pdf](http://www.twu.edu/media/documents/risk-management/TWU-Third-Party-Insurance-Standards.pdf)). By requiring such minimum insurance, the University shall not be deemed or construed to have assessed the risk that may be applicable to the Contractor. Therefore, the Contractor shall assess its own risks and, if it deems appropriate, maintain higher limits and/or broader coverages. The Contractor is not relieved of any liability or obligations assumed or pursuant to the contract by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types.

And will also comply with RFP sub-sections 6.4.2, 6.4.3, 6.4.4

## HUB subcontracting plan

Stated as: (required for proposals valued at  $\geq \$100,000$ ). No HUB subcontracting plan was requested/required for this RFP.

### 2.5 HUB Subcontracting Plan

TWU has determined that there are not subcontracting opportunities. No submittal is required.

TWU is relying upon the proposer's expertise to fully identify subcontracting opportunities that best align with their organization and this procurement request. Proposers, who intend to subcontract, are responsible for identifying all areas that will be subcontracted. In accordance with 34 TAC §20.11, a subcontractor means a person who contracts with a prime contractor to work, to supply commodities, or contribute toward completing work for a governmental entity.

Attachment A: W9

Attachment B: Conflict of Interest, Execution of Offer and Affirmations

Attachment C: Capabilities Statement

**Attachment A (W9)**

<b>W-9</b> <small>Form (Rev. October 2018) Department of the Treasury Internal Revenue Service</small>	<b>Request for Taxpayer Identification Number and Certification</b> <small>► Go to <a href="http://www.irs.gov/FormW9">www.irs.gov/FormW9</a> for instructions and the latest information.</small>	<small>Give Form to the requester. Do not send to the IRS.</small>
<p><b>1</b> Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  <b>Keocia Services LLC</b></p> <p><b>2</b> Business name/disregarded entity name, if different from above</p> <p><b>3</b> Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.</p> <p><input type="checkbox"/> Individual/sole proprietor or single-member LLC   <input type="checkbox"/> C Corporation   <input type="checkbox"/> S Corporation   <input type="checkbox"/> Partnership   <input type="checkbox"/> Trust/estate</p> <p><input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► <b>S</b>  <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small></p> <p><input type="checkbox"/> Other (see instructions) ►</p> <p><b>5</b> Address (number, street, and apt. or suite no.) See instructions.  <b>450 Century Parkway Ste 250</b></p> <p><b>6</b> City, state, and ZIP code  <b>Allen TX 75013</b></p> <p><b>7</b> List account number(s) here (optional)</p>		

<b>Part I Taxpayer Identification Number (TIN)</b>	
<p>Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i>, later.</p> <p><b>Note:</b> If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.</p>	
<input type="text"/> Social security number _____ - _____ - _____	<input type="text"/> Employer identification number <b>85-3920549</b>

<b>Part II Certification</b>	
<p>Under penalties of perjury, I certify that:</p> <ol style="list-style-type: none"> <li>The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and</li> <li>I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and</li> <li>I am a U.S. citizen or other U.S. person (defined below); and</li> <li>The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.</li> </ol>	

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	<b>Signature of U.S. person ►</b>	<b>Keocia Perry</b>	<b>Date ► 4/14/2022</b>
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**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

## SECTION 7 EXECUTION OF OFFER AND AFFIRMATIONS

Signing this proposal with a false statement is a material breach of Contract and shall void the submitted proposal or any resulting Contracts, and the Proposer may be removed from all proposal lists. By signature hereon affixed, the Proposer hereby certifies that:

- 7.1 The Proposer is not currently delinquent in the payment of any debt or taxes owed the State of Texas.
- 7.2 Proposer agrees that any payments due under this Contract will be applied towards any debt, including but not limited to delinquent taxes and child support that is owed to the State of Texas.
- 7.3 Proposer certifies as follows: "Pursuant to Section 231.006, Family Code, re: child support, the Proposer certifies that the individual or business entity named in this proposal is not ineligible to receive the specified payment and acknowledges that this Contract may be terminated and payment may be withheld if this certification is inaccurate."

Furthermore, any Proposer subject to Section 231.006, Family Code, must include names and social security numbers of each person with at least 25% ownership of the business entity submitting the proposal. This information must be provided prior to award. Enter the name and social security numbers for each person below. Proposers that have pre-registered this information on the Texas Comptroller of Public Accounts Centralized Master Bidders' List will be deemed to have satisfied this requirement.

Name: Keocia Perry	SS# 633-38-0380
Name:	SS#:
Name:	SS#:

- 7.4 The Proposer has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted proposal.
- 7.5 The Proposer has not received compensation for participation in the preparation of the specifications for this RFP.
- 7.6 Neither the Proposer nor the firm, corporation, partnership or institution represented by the Proposer, or anyone acting for such firm, corporation or institution has violated the antitrust laws of this State, codified in Section 15.01, et seq., Texas Business and Commerce Code, or the Federal Antitrust Laws, nor communicated directly or indirectly the proposal made to any competitor or any other person engaged in such line of business.
- 7.7 The Proposer certifies that the vendor and/or principals are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any federal agency, and have not within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state or local government contract or subcontract; violation of federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and are not presently indicted for, or otherwise criminally or civilly charged by a government entity with commission of any of these offenses.
- 7.8 Under Section 2155.006(b) of the Texas Government Code, a state university may not accept a proposal or award a Contract, including a Contract for which purchasing authority is delegated to a state university, that includes a proposed financial participation by a person who, during the five-year

period preceding the date of the proposal or award, has been: (i) convicted of violating a federal law in connection with a Contract awarded by the federal government for relief, recovery, or reconstruction efforts as a result of Hurricane Rita, as defined by Section 39.459, Utilities Code, Hurricane Katrina, or any other disaster occurring after September 24, 2005; or (ii) assessed a penalty in a federal civil or administrative enforcement action in connection with a Contract awarded by the federal government for relief, recovery or reconstruction efforts as a result of Hurricane Rita, as defined by Section 39.459, Utilities Code, Hurricane Katrina, or any other disaster occurring after September 24, 2005.

7.9 Proposer agrees to comply with Government Code 2155.4441, pertaining to service Contract use of products produced in the State of Texas when such products and materials are available at a price and delivery time comparable to products and materials produced outside of Texas.

7.10 To the extent this RFP relates to a project as defined Tex. Gov't Code §2252.201(5) (a project to construct, remodel, or alter a building, structure, or infrastructure; to supply material for such a project; or to finance, refinance, or provide funds for such a project), and no exemption in Tex. Gov't Code §2252.203 applies, any iron or steel product produced through a manufacturing process and used in the project that is the subject of this RFP must be produced in the United States as defined in Tex. Gov't Code §2252.201(4).

7.11 Pursuant to Texas Gov't Code Section 2270.001, Proposer affirmatively states that it does not boycott Israel. Additionally, Proposer shall not engage in a boycott of Israel during the term of any award or Contract.

7.12 Proposer certifies that they are in compliance with section 669.003 of the Government Code, relating to contracting with executive head of a State agency. If section 669.003 applies, Proposer will complete the following information in order for the proposal to be evaluated:

Name of Former Executive: \_\_\_\_\_

Name of State Agency: \_\_\_\_\_

Date of Separation from State Agency: \_\_\_\_\_

Position with Proposer: \_\_\_\_\_

Date of Employment with Proposer: \_\_\_\_\_

**n/a**

7.13 Any resulting Contract is not prohibited under Texas Government Code §2261.252(b) and Proposer agrees that if Proposer's certification is or becomes untrue, the Contract is void, and the Proposer will not seek and waives its right to seek any legal or equitable remedy for past or future performance under the Contract, including damages, whether under breach of contract, unjust enrichment, or any other legal theory; specific performance; and injunctive relief.

7.14 Conflict of Interest

7.14.1 The vendor certifies that (i) no relationship, whether by blood, marriage, business association, capital funding Contract or by any other such kinship or connection to the second degree of consanguinity exists between any owner of any Proposer that is a sole proprietorship, the officers or directors of any Proposer that is a corporation, the partners of any Proposer that is a partnership, the joint ventures of any Proposer that is a joint venture or the members or managers of any Proposer that is a limited liability company, on one hand, and an employee of any component of TWU, on the other hand, other than the relationships which have been previously disclosed to TWU in writing and (ii) Proposer has not been an employee of TWU within the immediate twelve (12) months prior to the submittal deadline. All disclosures by

Proposer in connection with this affirmation will be subject to administrative review and approval before TWU enters into a Contract with Proposer. Any violation of this conflict of interest policy shall result in immediate cancellation of any resulting Contract in addition to a potential debarment of the vendor from doing business with the State of Texas.

7.14.2 No officer or employee of Proposer is in any dual employment positions with TWU that would result in a conflict of interest in relation to his/her position at TWU. If such circumstance arises, the employee shall remove himself/herself from the Procurement process and disclose the relationship to his/her direct supervisor and to the Chief Procurement Officer. A TWU department may not hire a vendor if a current TWU employee of such department is also employed by such vendor; a current employee of such department has a direct or indirect ownership interest in such vendor; and/or the hiring of such vendor would result in the furtherance of any private interest or gain for a current employee of such department. If the owner of any such vendor who provides services to TWU is a TWU employee, compliant payment to any vendor classified as a sole proprietorship or an individual shall be made through the Payroll Services department.

7.14.3 Proposer will make all disclosures required under Texas Government Code § 2252.908 upon award of a Contract that has a value of at least \$1 million.

**7.15 Conflict of Interest Affirmation:**

**By signing and submitting the Proposal, the Proposer confirms that it acknowledges compliance and has provided all relevant information required below.**

- The Proposer represents and warrants that its provision of Goods or Services or other performance under the Contract will not constitute an actual or potential Conflict of Interest and represent and warrant that it will not reasonably create even the appearance of impropriety.
- Disclose any current or former employees who are current or former employees of the Institution.

Former Employee Name

TWU Department

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n/a

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- Disclose any actual or proposed personnel who are, or are related to, current or former employees of the Institution.

Actual or Proposed Personnel

Related Party

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n/a

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- The Proposer represents and warrants that it has not given and will not give, at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant or employee or representative of TWU in connection with the Solicitation or any resulting Contract.
- Neither the Proposer nor the Proposer's principals (including, but not limited to, an owner, proprietor, sole or majority shareholder, director, president, or managing partner) are debarred, suspended, or otherwise excluded from doing business with TWU. TWU may also verify that an entity or principals are not debarred, suspended or otherwise excluded to confirm that no Contracts are awarded, extended or renewed.

**Proposer Information and Signature**

Proposer certifies that the individual signing this document and the documents made a part of this RFP is authorized to sign such documents on behalf of Proposer and to bind Proposer under any Contract that may result from the submission of Proposer's proposal.

By signing the proposal, the vendor certifies that if a Texas address is shown as the address of the vendor, the vendor qualifies as a Texas Resident Bidder, as defined in 34 TAC sec. 20.38.

Payee Identification Number (PIN): 18539205494 00

Sole Proprietor should also enter social security No.: 633-38-0380

Proposer/Company: Keocia Services, LLC

Name (Typed/Printed): Keocia Perry

Title: Sole Proprietor

Street: 450 Century Parkway

City/State/Zip: Allen, TX 75013

Telephone No.: 214-295-2644

Fax No.: n/a

E-mail: keocia@keociaservices.com

Signature (INK): 

**Other Preferences** as defined in 34 TAC sec. 20.38 (check any that are applicable)

- Supplies, materials, equipment, or services produced in TX/ offered by TX bidders
- Agricultural products produced or grown in TX
- Agricultural products and services offered by TX bidders
- USA produced supplies, materials, or equipment
- Products of persons with mental or physical disabilities
- Products made of recycled, remanufactured, or environmentally sensitive materials including recycled steel
- Energy efficient products
- Rubberized asphalt paving material
- Recycled motor oil and lubricants
- Products produced at facilities located on formerly contaminated property
- Products and services from economically depressed or blighted areas

**THIS SHEET MUST BE COMPLETED, SIGNED, AND RETURNED WITH PROPOSER'S PROPOSAL.  
FAILURE TO SIGN AND RETURN THIS SHEET WILL RESULT IN THE REJECTION OF YOUR  
PROPOSAL.**



## Training & Development Services

### CAPABILITY STATEMENT



#### COMPANY OVERVIEW

Keocia Services LLC is a multifaceted woman-owned company focusing on training, public speaking, and organizational development. Keocia Services LLC has delivered motivational, inspiring, and topic-specific speeches at hundreds of public and private speaking engagements since its start in 2020. Additionally, we create and offer training programs and workshops that increase enterprises' productivity, effectiveness, and efficiency. One of the secrets to our success is that we work as a team with the businesses we support, ensuring that we are aware of the potential before creating training requirements that satisfy the organization's demands.

#### Company Snapshot

**Company:** Keocia Services LLC  
**CEO\POC:** Keocia Perry  
**Address:** 450 Century Pkwy Ste 250, Allen, Texas 75013  
**Phone No:** 214-295-2644  
**Email:** keocia@keociaservices.com  
**Website:** keociaservices.com  
**UEI:** QDAWKKC5JGM7  
**CAGE CODE:** 97HU5  
**DUNS:** 118414456

#### Area of Expertise

- Diversity/Inclusion
- Leadership
- Financial Management
- Ethics
- Technology Training (IT)
- Communication
- Professional Development Training
- Soft Skills Training
- EQi2.0 & 360 - Emotional Intelligence
- Executive Coaching
- Cultural Climate Studies
- Training Needs Assessment

#### Training & Development Services

- 611430- Professional & Management Development
- 611710- Educational Support Services
- 611699- All other Miscellaneous Schools and Instruction
- 611420- Computer Training
- 541612- Human Resources Consulting Services
- 561311- Employment Placement Agencies
- 561312-Executive Search Services

#### Why Keocia Services LLC?

By creating the ideal innovative solutions and strategies, we empower businesses. We collaborate with you to develop a company-specific plan that makes the most of your hiring practices. For your staff, we offer complete training & development services. Your company will have a competitive advantage thanks to our knowledge of the current business environment and experience.

#### Teaming on Government Contracts

Keocia Services continue to build strong relationships with other companies and will partner if necessary to ensure the capability is there to support and deliver timely services to our customers. Keocia services are committed to a quality brand of service and a relentless passion for providing the value-added in meeting customers' expectations.

#### Past Performance

- Fast Weight Transport:** Operations Management Consulting, (IT) Technology Training
- Vinyl 2 Vinyl:** Workforce Training, Diversity & Inclusion
- The Clean Queen LLC:** Workforce Training Series, Business Coaching , Developed LMS for company.
- Regions Bank:** Career Exploration Seminar to 1000+ employees

#### Certifications

- NCTRA Minority Business Enterprise
- NCTRA Women Business Enterprise
- NCTRA Small Business Enterprise

Pending EDWOSB, TX HUB, DBE

#### Partnerships

