

# Sample Request for Proposal

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## **Total Action Against Poverty Request for Proposals Client Management Software System**

Issued by Tim W Tickle  
Technology Resources Director

November, 20 2006

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## **INTRODUCTION**

Total Action Against Poverty, hereinafter referred to as "TAP," will contract with a vendor(s) for the purchase of a client management software system for a human services agency with multiple programs in multiple disciplines (housing, domestic violence, employment, education, etc) as outlined in the specifications of this Request for Proposal (RFP).

### **Agency Background**

TAP is the designated community action agency for the Fifth Planning District of Virginia, serving the counties of Alleghany, Botetourt, Craig, Roanoke, and Rockbridge as well as the cities of Buena Vista, Clifton Forge, Covington, Lexington, Roanoke, and Salem. The total population of the Fifth Planning District is 298,565 with 28,134 individuals (including children) living in poverty; a poverty rate of 9.4 percent.

Currently TAP offers more than 35 programs that can be divided into three broad categories – Assistance to Distressed Families, Children and Youth, and Helping People to Get Jobs and Become Self-Sufficient.

**Assistance to Distressed Families** includes programs that provide emergency food and shelter, domestic violence prevention and services, coordinated services to keep families together, and more permanent housing options. More than 2,770 individuals were helped last year.

- The Community Development programs of Housing & Community Development provide emergency services, community technology programs and centers, ESL assistance, support to dozens of community groups for capacity building and resource development, and experienced outreach and public education support for community-wide initiatives like Tap Fair Housing
- TAP's Transitional Living Center (TLC) offers emergency and transitional housing and nutrition for homeless individuals and families. The TLC provides long-term supportive housing and comprehensive services, enabling residents to stabilize their lifestyles and become self-sufficient.
- Share-HIP (Homeless Intervention Program) provides rental, mortgage and security deposit assistance to families/individuals in jeopardy of losing their homes due to eviction or foreclosure, or in need of moving into housing. Financial aid is provided in the form of loans and/or grants.

- TAP's Women's Resource Center provides comprehensive crisis and advocacy services to abused and deserted women and their children who wish to cultivate a more healthful, positive, stable environment.
- TAP Housing helps families find adequate housing by providing Section 8 vouchers in Roanoke County or, in all areas of the Fifth Planning District, improve the housing they already have with weatherization services, emergency home repair, and indoor plumbing for homes with inadequate plumbing. It also manages over 230 units of rental property, providing affordable quality residential opportunity for low--income families.
- TAP's Fatherhood and Families program assists families in distress; families disconnected by discord, by unacknowledged fatherhood, and/or by incarceration. The program is also designed to assist unemployed, non-custodial parents, the majority of whom are fathers of children on welfare.

**Helping At Risk Children and Youth** is accomplished through several TAP programs. Over 1,600 children and youth were enrolled in TAP programs in 2005-20046

- TAP Head Start and Early Head Start offers underprivileged children from birth to five years a developmental program that helps them deal with their present environment and later responsibilities in school and in life.
- Project Pride is an alternative education program providing individualized remedial instruction, counseling and referral services to at-risk youth
- Project Recovery is a dropout retrieval program. The purpose is to find students who have recently dropped out of public school and, through counseling of dropouts and families, re-enroll those students in the school system or engage them in remedial/alternative education, job-related learning, employment, or a combination thereof.

**Helping People to Get Jobs and Become Self-Sufficient** involves adult educational programs that help individuals to learn to read, get their GED, and go to college. Employment programs work in cooperation with many of our other programs to ensure that our clients can get and keep jobs.

- Adult Literacy is an education program providing one-on-one tutorial sessions for non-readers; individualized and group instruction for upgrading client skills in order to obtain a GED or complete an employment or education entrance exam.
- The Center for Employment Training is an open entry, open exit and highly individualized employment training program. Hands-on skills training is tailored to meet the needs of local employers.

- The Youth Employment Program is a year-round program for youth 14 to 21 with emphasis on remedial education, academic enrichment, and career exploration.
- Project Discovery is a dropout prevention, college access program designed to stimulate first generation college-goers through information and encouragement. Activities include cultural workshops, guidance in class selection, workshops in both financial aid and college life, and college visitation.
- TAP Enterprises, and Business SEED, Inc. are the entrepreneurial and business development arms at the agency. Business SEED initiatives provide a full range of services to potential and current local entrepreneurs, including business consultation, business plan development, micro-enterprise loan funds, leveraged conventional financing, and management assistance. SEED also provides an effective Individual Development Account program for matched-savings asset development, and a tax-preparation program focusing upon EITC returns, bringing significant resources back to low-income families in our area. TAP Enterprises are agency-operated enterprises that perform both entrepreneurial and program-related purposes. We operate TAP Properties, leasing both commercial and warehouse space in the region.

## **CURRENT ENVIRONMENT**

TAP currently uses OCTOPI a Microsoft Access (Visual Basic) based client management software system provided by Community Networks Corporation. The system supports over 40 users and a client base of over 10,000. Users access the software via a local LAN connection or remotely via Microsoft terminal server.

## **GENERAL INFORMATION**

### **Term of Contract**

The initial contract term for this client management software will be negotiated at the time of contract award.

### **TAP's Right to No Award**

TAP reserves the right to reject all proposals, reject portions of any proposal, or accept the proposal deemed most advantageous to TAP.

### **Cancellation**

Should the vendor fail to meet the requirements of the contract, TAP may cancel the contract with a thirty (30) days notice and award the remainder of the contract term to the next best vendor.

## **Vendor Selection and Contract Award**

TAP will conduct the selection and contract award in the following manner:

- This document will be distributed to all interested vendors.
- Proposals will be received and evaluated as described in the RFP. Selected vendors will be asked to demonstrate their client management software and/or make oral presentations to TAP.

## **Schedule for Evaluation Process**

|   |                    |
|---|--------------------|
| RFP distributed to vendors  | November 20, 2006  |
| Deadline for RFP responses  | December 20, 2006  |
| Invitations for formal presentations  | January 12, 2007   |
| Vendor demonstrations/presentations   | February 5-6, 2007 |
| Selection of vendor/contract negotiation  | March 5, 2007      |
| Client management software implementation,<br>database migration and user training. | March – June 2007  |
| Client management software operational  | July 1, 2007       |

## **PROPOSAL SUBMITTAL**

### **Preparation and Submittal**

Vendors will prepare proposals in compliance with all of the instructions outlined in the RFP. Partial or incomplete proposals will be rejected. A vendor official with legal authority to bind the vendor must sign the proposal in ink. All proposals must be firm for acceptance within 180 days following the proposal opening.

### **Number of Copies & Contact Information**

Please submit 6 original copies and an electronic copy (on disk or via e-mail) of your proposal, including all supporting documentation, to:

Tim W. Tickle  
Total Action Against Poverty  
145 Campbell Ave  
Roanoke, Virginia 24001  
540-815-2881  
tim.tickle@taproanoke.org

Please contact Tim Tickle at 540-815-2881 or via e-mail at [tim.tickle@taproanoke.org](mailto:tim.tickle@taproanoke.org) with any questions about the RFP.

## **PROPOSAL FORMAT**

To facilitate the evaluation of the proposals, vendors shall utilize the following proposal format:

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## **Cover Letter Referencing the RFP**

### **Table of Contents**

#### **Company Background.**

Vendor shall provide a brief (one page) company description, history, number of employees, and financial status.

#### **Executive Summary**

Vendor shall describe in non-technical terms its client management software, identifying any unique or distinctive features of the software to which the vendor wishes the evaluation committee to give particular attention. Do not include any pricing in this section.

#### **Questions and Answers**

Vendor shall provide detailed answers to the questions contained in the RFP.

#### **Response to Terms and Conditions.**

Vendor shall indicate its agreement to the specified terms and conditions and/or provide the requested responses throughout the entire RFP.

#### **Proposal Costs**

All costs incurred by the vendor in preparing the proposal, or costs incurred in any other manner by the vendor in responding to this proposal will be solely the responsibility of the vendor. All materials and documents submitted by the vendors in response to this RFP become the property of TAP and will not be returned to the vendor.

## **VENDOR QUALIFICATIONS**

All vendors submitting proposals must meet the following minimum requirements at the time of proposal submittal to qualify for consideration:

#### **Business Operation.**

Vendor must have operated a business providing similar service and support for a minimum of five (5) years.

#### **Business Compliance.**

Vendor must be in compliance with all city, county and state business licensing, bond and insurance requirements.

## **PROPOSAL EVALUATION CRITERIA**

Vendor shall provide the following information to help us evaluate their proposal:

#### **Financial Information.**

Please indicate any planned mergers or acquisitions. Please indicate if your company is currently in bankruptcy proceedings.

#### **Customer List.**

List at least five (5) companies/customers as references. State company name, address, contact name and telephone numbers, installed and supported software and duration or relationship.

## **BASIS OF AWARD**

The following criteria will be used to evaluate each RFP response.

- Technical capability
- Software capability
- Functionality
- Vendor support, responsiveness and follow-up
- Ease of use
- Flexibility and ease of product implementation
- Implementation plan and support
- Pricing
- Timely and complete response to RFP
- Vendor client references
- Results of requested demonstrations and presentations

## **COMPANY OVERVIEW**

- Provide contact information for the principle individual(s) to be contacted regarding the information in this RFP.
- Provide a brief history of your company and the location of corporate headquarters and offices.
- How long have you been in business? How long have you been providing client management software to Community Action Agencies or other human service providers?
- Are you a private or publicly traded company? Provide evidence of your company's financial stability and projected longevity.
- How many current client management software clients do you have?
- Describe what differentiates your organization from your competitors.

## **PRODUCT OVERVIEW**

- Provide an overview of your client management software system. Attach any relevant marketing materials and data sheets.
- Describe the user interface and system navigation features. How is your interface and navigation superior to those of your competitors?
- In what ways can your system be customized?
- Describe user help features built into your system.

## **TECHNOLOGY**

List the recommended optimum hardware requirements for your client management software:

Server:

Client PC:

List the recommended optimum software (OS) requirements for your client management software:

Server:

Client PC:

What is the recommended way to access you client management software from a remote location?

Does your client management software have a web interface?

Will your client management software work over a VPN?

Will your client management software work over terminal server?

In what language is your client management software written?

What database system (SQL, MS\_Access, oracle, etc) does the client management software use?

Is there a limit to the number of records your client management software supports?

## **CLIENT TRACKING FUNCTIONS**

Please provide a yes or no answer with a brief explanation for the following questions.

### **Client Eligibility**

How does your client management software aid in determining economic eligibility for agency services?

Ability to search system for client by key fields

Alert staff to any reasons for past ineligibilities.

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Alert staff to client eligibility or other available services within the agency

### **Intake**

Ability to maintain data for both individuals and families

- a) At any point in time
- b) During and after family composition change.

Ability to link individuals to a family

Ability to track referred-from source

Capture current employment and education

Capture for each client all demographics required by community service block grant reports.

Capture current outside services utilized

### **Centralized Intake**

Is there the capability of sharing intake information between programs with no duplication of records?

Can the central intake form be designed to ask sufficient questions to determine eligibility for most human services programs?

Is client information changed by one component updated across the entire database?

How is error/omission tracking handled for client intake or update?

### **Agency Services**

Ability to custom enter list of services offered

Ability to update status of each client need

Ability to track client participation in programs

Ability to enter narrative of client progress, developments, concerns, etc.

### **Referrals**

Ability to maintain referral agency details

Ability to search for referral agency by multiple criteria

## **Case Management**

Ability to track client interactions (i.e. phone, meetings, file updates)

Ability to schedule client meetings and notify case worker when due.

Ability to track client goals, progress and outcomes

- a) Absolute outcomes (CSGB)
- b) Scalant outcomes

Ability to enter notes for each interaction

Ability to maintain history of employment and education during service period and upon exit

Ability to maintain history of outside services

Ability to monitor program outcomes as distinct from client outcome.

## **Reporting**

Ability to create ad-hoc lists and reports using all database fields.

Ability to include user-defined fields in reports

Ability to produce unduplicated client counts by all demographic and program criteria and data.

Ability to produce services counts by date range

Ability to use Crystal Reports to produce other reports

Pre-made report forms for standard queries such as number of clients in a program, number of services per client and per program, list of clients per program, mailing lists of clients per program and per geographical area, by CSBG requirements, etc.

User customizable queries for different reports.

Ability to print all forms and reports to a local or network printer

## **Data Management**

Describe database structure and component interaction.

Ability to export data

Ability to import data

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Ability to maintain/edit standard drop-down lists

Ability to create/define fields for intake information

Ability to create/define fields for services information

Ability to create/define fields for case management information

Automatically enters current date when record is entered with user override.

Automatically updates date when record is edited

Security based on

- a) role of user
- b) group
- c) program confidentiality requirements

Ability to customize with relative ease

Ability to create mailing lists of clients by program, date of service, or any key field

## **TRAINING**

Is a standard training package included with the purchase of the client management software? If so please give details?

Please provide details of availability of additional training packages? (Cost, duration, user level)

## **SUPPORT**

How will product technical support be handled?

Days and hours support availability?

Methods of support contact? (email, telephone, real time online, etc)

Average support call back time?

Average problem resolution time

Can the program be customized to meet our individual needs?

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Cost of program customization?

How do you address customized vs. standardized program updates across the customer base?

**COST**

Total cost of client management software?

Annual support cost?

System use training cost?  
Cost for program updates.

**OTHER**

Can data from our current client management software be imported into your client management software system? Is there a cost for this service?

Is there an online/off-line interactive user demo available? If so, web address.