



COMMUNITY ACTION FOR IMPROVEMENT, INC.

**Request for Proposal for a
Client Data Management System**

September 18, 2023

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1 Statement of Work

1.1 Purpose

The purpose of this Request for Proposal (RFP) is to invite prospective vendors to submit a proposal to provide Community Action for Improvement, Inc. (CAFI) with a software system which will collect and manage client data information and other Agency information. Through this data management system, CAFI will be more efficient and supported by complete, real time, easily accessible data to analyze and determine sufficient outcomes of the clients they serve.

Community Action for Improvement, Inc. (CAFI) is accepting proposals for the purchase of software for a Client Management System capable of storing, managing, and analyzing client information management reports on all information pertaining to this agency. Vendor must provide the ability to map existing data from the CAFI's current Data Systems to provide a database as the primary record keeping. Vendor must perform conversion of present data.

1.2 Coverage & Participation

The intended coverage of this RFP, and any agreement resulting from this solicitation, shall be for the use of all departments at Community Action for Improvement, Inc. along with any satellite offices. Community Action for Improvement, Inc. reserves the right to add and/or delete elements, or to change any element of the coverage and participation at any time without prior notification and without any liability or obligation of any kind or amount.

2 General Information

2.1 Original RFP Document

Community Action for Improvement, Inc. shall retain the RFP, and all related terms and conditions, exhibits, and other attachments, in original form in an archival copy. Any modification of these, in the vendor's submission, is grounds for immediate disqualification.

2.2 Information about Community Action for Improvement, Inc.

Community Action for Improvement, Inc. (CAFI) is a local 501©3 private nonprofit organization, belonging to the National Community Action Partnership network that spans across the nation. CAFI is grants and contracts. CAFI is governed by a tripartite board structure that is designed to promote the participation of the entire community in the reduction or elimination of poverty. CAFI employs 100+ staff members at multiple locations in Troup, Meriwether, Heard, Carroll and Coweta Counties in GA. The corporate location is located at 1380 LaFayette Parkway, LaGrange, GA 30241.

Mission Statement

To build sustainable communities with partners by providing services and resources utilizing the “whole family approach” with low-income households to help reduce the burden of poverty.

Vision Statement

To become an agency with unlimited avenues of resources for our community, taking advantage of every opportunity for growth.

Value Statement

To be a well-respected organization of excellence in which services and resources are delivered with the utmost integrity recognizing the diversity of the customers we serve.

2.3 Current Data Systems

Description of existing client data systems:

- Community Services uses EZtrak (ga06.eznextgen.com) to collect and track client data for LIHEAP program and CSBG case management.
- Head Start/Early Head Start uses Child Plus (childplus.com) to collect information for children and parents.
- Weatherization Assistance Program uses Hancock (accessed via National Energy Audit Tool [NEAT]).

Description of the workstations:

There are multiple locations and workstations that will routinely access client data system information. Computers currently have an [Intel I5 or I8 processor with a minimum of 8GB of RAM.]

Description of operating system:

Microsoft Windows 10-11

Description of communications established with any remote locations:

All remote locations communicate back to the Central Office with site to site VPN connections, all are using M365 including Teams Phone System for direct voice and data communications

Description of current HCM solution:

Paycom (paycom.net) is our HR\payroll system

What type of Security is required for CAFI software?

We are utilizing Bitdender GravityZone for our content filter, and threat management. We have on premises firewalls for each location’s data security.

2.4 Scheduling

The following is a tentative schedule that will apply to this RFP, but may change in accordance with the organization's needs or unforeseen circumstances. Any updates or modifications to the schedule will be communicated as necessary. CAFI is committed to conducting this RFP process effectively and effectively to ensure the successful implementation of the system.

Public Notice of RFP	November 3, 2023
Vendor Questions and Recommendations	
Must be submitted via email to: shendrix@cafi-ga.org	November 30, 2023
Responses to Vendor Questions will be provided	December 8, 2023
Submittal Deadline	December 15, 2023
Anticipated Final Decision	December 29, 2023
Go Live (No Later Than)	July 2024

Proposal Preparation Instructions

2.5 Responsibility and Compliance of the RFP

The vendor acknowledges and agrees full responsibility for thoroughly understanding the entirety and details of this RFP. This includes making necessary inquiries to CAFI to gain such understanding. CAFI retains the right to disqualify any vendor who demonstrates less than such understanding. CAFI reserves the right to determine understanding of the vendor and cancellation of an award that has been made. Any such disqualification or cancellation will incur no fault, cost or liability to Community Action for Improvement, Inc. (CAFI).

The vendor hereby acknowledges it's committed to comply with E-Verify requirements in accordance with applicable laws and regulations.

2.6 Good Faith Statement

All information provided by Community Action for Improvement, Inc. in this RFP is offered in good faith. Individual items are subject to change at any time. Community Action for Improvement, Inc. makes no certification that any item is without error. Community Action for Improvement, Inc. is not responsible or liable for any use of the information or for any claims asserted there from.

2.7 Communication

Verbal communication shall not be effective unless formally confirmed in writing by the specified procurement official in charge of managing this RFP process. In no case shall verbal communication govern over written communication.

Vendors' inquiries, questions, and requests for clarification related to this RFP are to be directed in writing to:

Community Action for Improvement, Inc.
Administration
1380 LaFayette Parkway
LaGrange, GA 30241

Attention: Sherry Hendrix
Telephone: 762-842-6019
E-mail: shendrix@cafi-ga.org

Applicable terms and conditions herein shall govern communications and inquiries between Community Action for Improvement, Inc. and vendors as they relate to this RFP.

Formal Communications shall include, but are not limited to:

- Questions concerning this RFP: Errors and omissions in this RFP and enhancements: Vendors shall bring to Community Action for Improvement, Inc. any discrepancies, errors, or omissions

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that may exist within this RFP. With respect to this RFP, vendors shall recommend to Community Action for Improvement, Inc. any enhancements that might be in our best interests. These recommendations must be submitted in writing and be received prior to November 30, 2023 4:00 PM, EST.

- Verbal and/or written presentations and pre-award negotiations under this RFP.
- Addenda to this RFP.

Addenda: Community Action for Improvement, Inc. will make a good-faith effort to provide a written response to each question or request for clarification that requires addenda within seven business days.

- Community Action for Improvement, Inc. will not respond to any questions/requests for clarification that require addenda, if received by Community Action for Improvement, Inc. after November 30, 2023 4:00 PM, MST.

2.8 Submittal Requirements

There are two parts to the proposal, the Functional Proposal and the Cost Proposal.

Instructions for submitting the proposal is detailed below.

- Submit one (1) original hardcopy must be sealed and submitted by mail to Community Action for Improvement, Inc., Attn: Sherry Hendrix, 1380 LaFayette Parkway, LaGrange, GA 30241
- SEPARATELY Submit one (1) original electronic copy by email to Sherry Hendrix at shendrix@cafi-ga.org
- The original proposals must include original signatures, in ink, by authorized personnel, on all documents that require an authorized signature.

2.9 Method of Award

Award will be made to the Proposer offering the most advantageous proposal after consideration of all Evaluation Criteria set forth below. The criteria are not listed in any order of preferences. CAFI shall not be obligated to accept the lowest priced proposal, but will make an award in the best interests of CAFI after all factors have been evaluated. The awarded vendor will be required to enter into a Service Agreement with CAFI.

Evaluation Criteria:

1. Capability of vendor to meet or exceed requirements set forth in Scope of Work, Requirements and Specifications (Addendum A).
2. Expressed interest in working with Community Action for Improvement, Inc. and information provided on the Vendor Qualifications and References and Vendor Characteristics of Product and Services.

3. Affordability of services, support, competence, experience, renewal options, delivery period, guarantees/warranties, and service level agreements available from the vendor.
4. Financial stability of vendor.
5. Vendor references.

2.10 Selection and Notification

Vendors determined by Community Action for Improvement, Inc. to possess the capacity to compete for this contract will be selected to move into the negotiation phase of this process. Written notification will be sent to these vendors via email. In conducting discussions and/or negotiations, CAFI will not disclose information derived from proposals submitted by competing proposers.

Award is contingent upon the successful negotiation of final contract terms. Community Action for Improvement, Inc. reserves the right to reject any or all proposals or any part of a proposal. CAFI reserves the right to reject the proposal of any proposer who previously failed to perform adequately for CAFI or any other related agency. The successful contractor must provide current copies of all necessary permits, insurance and licenses needed to provide the service stated herein at Community Action for Improvement, Inc. in LaGrange, GA

3 Scope of Work, Specifications & Requirements

Client Data Collection:

Capture and maintain comprehensive client information, including demographics, contact details, and relevant background data.

Client Interaction Tracking:

Record and track client interactions, appointments, service provision, case notes, and progress in a centralized system.

Multi-Program Support:

Allow for the segmentation and organization of client data by program, enabling efficient tracking for each grant-funded initiative.

Custom Data Fields:

Provide the ability to add custom data fields to capture program-specific client information or requirements. Such as: governance member information and attendance, meeting minutes, in-kind donations, food and nutrition data, etc.

Case Management:

Manage cases and client progress, including the ability to set goals, record outcomes, and measure program effectiveness. Track participation data, such as health, education, mental health and attendance.

Appointment Scheduling:

Schedule client appointments, send reminders, and manage staff schedules across multiple programs.

Data Security and Privacy:

Implement robust data security measures to protect sensitive client information.

Ensure compliance with data protection regulations relevant to your organization, such as GDPR or HIPAA.

Reporting and Analytics:

Generate customizable reports on client demographics, services provided, outcomes, and program impact. Provide data analytics tools to assess program effectiveness and make data-driven decisions.

Client Communication:

Facilitate communication with clients through email, SMS, and in-app messaging.

Store communication history within client profiles.

Access Control:

Implement role-based access control to ensure data security and privacy, restricting access to client data based on user roles.

Integration:

Integrate with CAFI's current software systems listed in section 2.3, to streamline operations.

Scalability:

Ensure the system can accommodate the growth of the organization and the addition of new grant-funded programs.

Search and Retrieval:

Enable easy and efficient search and retrieval of client data, allowing staff to quickly access the information they need.

User-Friendly Interface:

Provide an intuitive and user-friendly interface to enhance user adoption and productivity.

Training and Support:

Offer training resources for current and new employees, as well as ongoing technical support to help staff effectively use the software.

Audit Trails:

Maintain detailed audit logs to track changes and actions related to client data for transparency and accountability.

Data Backup and Recovery:

Regularly back up client data to prevent data loss and ensure recovery in case of unforeseen events.

Data Export:

Enable the export of client data and reports in various formats for external reporting and analysis.

Document Management:

Upload and store relevant documents associated with clients, such as signed consent forms, assessments, or service records to support the data collection.

4 Vendor Qualifications & References

Please provide the following information about your company, experience and services. Please respond to each item and provide supporting documentation and/or exhibits as requested or desired.

1. **Company Name**
Address
Telephone Number
E-mail Address
Name of Contact Person
Name of Person with binding authority to enter into contracts
2. Provide a brief history of the Company and the proposed software.

3. Describe professional staffing available for development, training, implementation, and support services. Include qualifications and experience.
4. Describe general characteristics that differentiate your company from others in the industry. Including any special advantages your company or your system may provide. For example, describe how your system and services support decision-making, streamline tasks, reduce errors, and/or make data more effective.
5. Describe your installed base of customers.
6. Provide a list of five (5) sites where your software and services are currently utilized, as well as those where software is being installed. Please indicate if these sites are within the Community Action Network.
7. Proposers should provide a minimum of two (2) references from similar projects performed for any local government clients within the last three years. Information provided shall include:
 - Client name
 - Contact information
 - Project description
 - Project dates (starting and ending)
8. Describe your company's purpose, mission and values and explain the relationship between them and this organization's needs.

5 General Characteristics of Product and Services

1. Describe the proposed system architecture and the language in which it is written.
2. Describe the fundamental design of the data software application to include the database structure and connectivity, and the method of data entry/user interface.
3. Describe your implementation services, with particular emphasis on planning, conversion and process change management. Provide a sample incremental plan including installation agenda. Please ensure this plan includes a timeline of the implementation, with regards to the plan given under the Tentative Timeframe section of this RFP.
4. Identify issues and challenges this organization should anticipate in a data software implementation and indicate how they are resolved using your system and services.
5. Describe the types of documentation your company provides with the system. In what forms is it provided and how is it updated and distributed? Are employee training and updates included as a part of support services?
6. Describe your technical support services available through the following areas and include any costs associated with these services. If there are different levels for support services available please describe the levels and list the services included.
 - Annual system review
 - Internet Technical Assistance
 - On-line support services (list hours)

- Remote Diagnostics
 - Regional Training
 - User Groups or Annual User Conferences
 - Email
 - Upgrades, Patches
 - Enhancements, Customizations
 - Documentation, manuals or Instructional Videos
7. Provide a complete and detailed process that customers would utilize in the following situations:
- Reporting a problem with the software.
 - Obtaining instruction/clarification on a specific system feature.
 - Requesting customized reports or services.
 - Receiving requested changes for compliance and reporting changes required at State of Georgia or Federal level.
 - Obtaining professional advice due to changes in the structure or organizational setting CAFI?
 - Obtaining technical assistance in making changes in the system coding to achieve a specific objective.
 - Requesting and arranging an increase in the number of workstations or users.
 - Requesting additional instruction or on site services.
 - Requesting and obtaining the results of your security audit performed by a third party that shows your development and system designs are following industry-accepted practices.
 - Reporting a potential security breach in your software/system.
 - How does your software handle security for the entire system as well as access control for employees of the software?
 - Does your system integrate to assist in providing security or group security permissions?

6 Budget & Estimated Pricing

Community Action for Improvement, Inc. has not yet established a budget for this project. Budgets will be discussed after evaluation of the received RFPs.

All vendors must fill out **Addendum B**. The vendor must agree to keep these prices valid for 60 days.

7 Insurance Requirements for General Liability and Cybersecurity

The vendor shall provide general liability and cybersecurity insurance certificates to Community Action for Improvement, Inc. This insurance shall cover claims arising from data breaches, cyberattacks,, and unauthorized disclosure of client data or other sensitive information. All insurance, certificates and endorsements are subject to review and approval by Community Action for Improvement, Inc.

INDEMNIFICATION

Consultant/contractor expressly agrees to indemnify and hold harmless CAFI, or any of its officers or employees, from any and all claims, damages, liability or court awards, including attorney's fees that are or

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may be awarded as a result of any loss, injury or damage sustained or claimed to have been sustained by anyone, including, but not limited to, any person, firm, partnership, or corporation, to the extent caused by the negligent acts, errors or omissions of consultant/contractor or any of its employees or agents in performing work pursuant to this agreement. In the event that any such suit or action is brought against CAFI, CAFI will give notice within 10 days thereof to consultant/contractor.

8 Vendor Certification

This certification attests to the vendor’s awareness and agreement to the content of this RFP and all accompanying calendar schedules and provisions contained herein.

The vendor must ensure that the following certificate is duly completed and correctly executed by an authorized officer of your company.

This proposal is submitted in response to *Request for Proposal for Client Data Management System* issued by Community Action for Improvement, Inc.. The undersigned is a duly authorized officer, hereby certifies that:

Vendor Name:

agrees to be bound by the content of this proposal and agrees to comply with the terms, conditions, and provisions of the referenced RFP and any addenda thereto in the event of an award. Exceptions are to be noted as stated in the RFP. The proposal shall remain in effect for a period of 90 calendar days as of the Due Date of the RFP.

The undersigned further certify that their firm (check one): IS IS NOT

currently debarred, suspended, or proposed for debarment by any federal entity. The undersigned agree to notify Community Action for Improvement, Inc. of any change in this status, should one occur, until such time as an award has been made under this procurement action.

Person(s) authorized to negotiate on behalf of this firm for the purposes of this RFP are:

Name:

Title:

Signature:

Date:

Name:

Title:

Signature:

Date:

Signature of Authorized Officer:

Name:

Title:

Signature:

Date:
