# INTRODUCTION

This RFP document is an invitation to submit proposals for a project to replace an existing legacy software system, while providing much needed enhancements to the overall business processes. This project will be established as Project Alpha and the start date is slated for January. Timeline to implementation and cut over will be a determining factor in our evaluations.

The intent is to obtain proposals and vendors’ background information for the selection of one or more software and service provider to participate in this project. Through this process, AGENTS seeks to develop operational relationships with software partners that can meet the current project objectives and provide support in the years to come.

# TERMS & CONDITIONS

### Payment Terms

Fixed price with milestone payments.

### Ownership of Deliverables

All custom software developed for the purpose of the project will be the sole ownership of AGENTS.

### Non-Disclosure of Confidential Information

Release of sensitive information, including but not limited to data, personally identifiable information, database structures, current screenshots of the existing system, is conditioned upon the execution of a Non-Disclosure Agreement between AGENTS and Vendor governing the information provided by AGENTS to specify the work upon which the bid is based, and the proposal which AGENTS shall receive from Vendor.

# GENERAL INFORMATION

### Definitions

**Customization**: Software code needs to be written to add business rules, fields, formulas, forms or user data entry screens that does not currently exist in the system. This excludes utilization of Customizable Fields.

### Purpose of this Request

The purpose of this RFP is to request proposals from software development - System Integrator service providers to meet certain requirements and project goals predefined by AGENTS. The intent is to obtain proposals (bids) and vendors’ background information for the selection of one or more service providers to enter a contracting phase to define the final pricing and specify the scope of work.

### Service Background

There are three core areas of AGENTS’s service to our clients; including Housing Services (home weatherization, essential home repair, single family rehabilitation loans, and the long term care Ombudsman program), Community Action (homeless services, energy assistance, medical low acuity alternative destination rides to urgent care when referred by a paramedic), and Financial Stability (home ownership education and counseling, foreclosure prevention, small business lending/technical assistance/business plan development, financial services education) to name a few. All these services are provided to clients in a non- threatening environment where everyone is treated with the utmost dignity and respect.

AGENTS’s programs are connected by a one-of-a-kind enterprise data system. This system allows AGENTS programs to operate and track data independently yet work together to identify and respond to client and community needs quickly and effectively across our different physical locations and between programs. This core operating platform enables clients to access our full range of services through one portal. The existing database is a legacy system developed in house over 30 years ago and the platform (FoxPro) is no longer supported by Microsoft and must be replaced. It is a robust system that has provided the agency with an unduplicated client count and the flexibility to be responsive to changing local need. As AGENTS has added more programs for more support, the existing system has met with challenges which have forced many work arounds, such as duplicate entry in external systems, limited ability to integrate with newer, more modern third-party systems, limited ability to view and report on historical data and an ever expanding excel spreadsheet library.

### General Information About Project Alpha

We are seeking a product that will not only replace the system we have but enhance our user experience and allow us to grow and expand as new areas arise where we can provide our services through new programs. The new system will need to accommodate our 150+ user base as well as provide a pathway to share our data with partners through API interactions or other easily used mechanisms. Most, if not all, programs will contain Personally Identifiable Information, therefore data storage and exchange will need to conform to security standards for PII, such as the California Consumer Protection Act (CCPA). Along with this, we do have programs which store medical record data. Any new system we evaluate will have to comply with HIPAA standards for those specific programs, if not across the entire system.

### Contract Term

The term of the contract that will be awarded at the end of this request process will commence upon AGENTS’s execution of the contract and will extend no longer than the duration of the project required to complete the designated deliverables, or a termination date which will be specified in the contract itself. Upon the acceptance of the final deliverable, the contract will be deemed satisfied. AGENTS makes no commitment to follow-on work following this process. Subsequent contract grants will be at AGENTS’s discretion and based upon the quality of the work performed on this project.

### Presentations and Demonstrations

Demonstrations will be presented to the AGENTS team by selected vendors as part of the final selection process. These may be done in person or remotely via screen sharing. These presentations are intended for the selected vendors to demonstrate how their product will meet the specific needs of Project Alpha and it is the expectation of the AGENTS team that the vendors chosen to present will highlight specific areas of their applications which meet the needs discussed in this RFP. The expectation is that there will be technical staff attending the vendor presentations to assist with functional questions.

# TECHNICAL SPECIFICATIONS

### Resources to Be Provided by AGENTS

* Hardware to support testing
* Third party software systems currently in use which require integration, including licensing

### Resources to Be Provided by the Vendor

* End to End Testing Environment, to persist over the lifetime of the software usage at AGENTS which allows for testing of all aspects of the software implementation, including third party software integrations.
* Training Environment
* Training Program and documentation to support a “Train the Trainer” methodology
* Software manuals and user guides that outline how to use system features, including any custom features.
* Software licenses needed to support Vendor Product Testing and Training Environments, including but not limited to: Database Server Licenses, Third Party Software Licenses not currently in use

### Deliverable Overview and Specification

All technical deliverables will be expected to conform to a standard format to be agreed upon during final contract negotiations. This standard format will outline:

* How the product is delivered
* How documentation will be provided
* How testing was conducted
* How User Acceptance testing can be conducted.
* Defect report process flow
* Defect resolution plan

## Overall Systems Requirements

The following requirements are needed throughout the system for every program.

* + - * Purchase Order Management
      * Budget Management
      * Grant Management
      * Contract Management
      * Integrated Inventory Management
        + Needs to be flexible enough to be managed independently per program
      * Client Intake, Specific to the Program (see below)
        + Geo Location of Addresses

GPS nets setting specific metropolitan areas

Layering Districts

* + - * + Custom Income Calculations

see Image 1

* + - * + Custom Percentage Poverty Calculations

see Image 1

* + - * + Ability to add lifetime limits per person, per program for benefits
      * Upload Media (video, pictures, etc.) associated with Entities
        + Client
        + Vendor
        + Staff
        + Project
        + Others…
      * Report Dashboard
      * Mail Merge
        + Letter generation
        + Mailing Label Generation
        + Customizable mail merge documents
        + Customizable Fillable Forms
      * Timesheet
        + Salary Employee
        + Hourly Employee
        + Volunteer
        + Timesheets need to tie back to an activity and are funded by multiple grants per activity
        + General time allocation: ability to allocate non-worked paid hours distribution based on actual worked hours

See Timesheet Allocation Worksheet

* + - * + Ability to have total labor costs in projects

Labor cost breakdown by type

Weatherization

Health/Safety

Repair

* + - * CRM
      * Custom User Form Creation / Data Entry Management
        + Similar to a Google Form for collecting data
      * Survey Creation and Management
      * Scheduling and Calendar
        + Local and Web based
        + Reminder Call System

Phone / Text

* + - * Customizable Data Entry Fields
        + Unlimited in number
        + Must be able to perform calculations to populate other fields (including custom)
        + Must be able to report on these fields
      * Customizable Calculation Fields
        + Unlimited in number
        + Must be able to populate other fields
        + Must be able to report on these fields
      * Customizable Reporting
      * Specific Report Generation
        + For reports more complex than can be built in the Customizable Reporting Solution
        + Each program will need up to 15 reports created by the installation team during the transition process for use upon go-live
      * Data Integration with Third-Party Systems
        + Each program will have specific needs for use of Application Programming Interfaces between the new system and the third- party systems.
        + The new system should allow for both data export and import using these Application Programming Interfaces
      * Data Security
        + HIPAA Compliance – There are certain programs which store data which needs to be HIPAA compliant. As such, the new system will have to be compliant with the HIPAA standard for at ‘minimum’ those programs
        + Personally Identifiable Information – All client data stored within the system contains Personally Identifiable information, in most cases the Social Security Number is stored.

## Accounting

The accounting team works with the Blackbaud Financial Edge package to manage the day-to-day accounting needs. This system has worked well in the past, but they are open to investigating new solutions if that is in the best interest of the overall software suite, however if possible it would be preferred for there to be integration between the new Community Action system and Financial Edge.

* + - * AR
      * AP
      * Payroll
      * Integrated Banking
      * State and Federal Tax Reporting
      * Data Integration with Third Party systems such as Financial Edge

## Ride to Care

* + - * Partner Management
        + Such as a local Clinic
      * HIPAA Compliance

## Energy

The Energy Program at AGENTS is there to assist members of the community with their heating costs throughout the winter as well as home electricity needs. This is a program that relies heavily on specific state and federal regulations and funding sources, so it must be managed and reconfigured on a yearly basis as the regulations and funding sources change.

* + - * State of Washington Heating Assistance Management
        + Must maintain multiple data for multiple years
        + Must be able to reset each client for a new year without losing data history
        + Custom data calculation formulas
        + See Energy Calculation attachments
      * Client Intake and Management
      * Emergency Management
        + For items needing immediate attention such as a Shut Off
      * Data Integration with Third Party systems, such as Avista and the State of Washington Department of Commerce
        + Possibility of HIPAA compliance needs on data export from the system to partners
      * Volunteer Management
      * Vendor Intake and Management

## Communications

The Communications team at AGENTS is responsible for getting the word out about the services offered and helping the community understand how AGENTS can help them. Along with this, they assist in managing the many donors and community outreach programs.

* + - * Event Management
      * Donor Management
      * Geo Location of Addresses
        + GPS nets setting specific metropolitan areas
        + Layering Districts
      * Inventory Management
      * Task Management
      * Volunteer Management
      * Data Integration with Third Party systems such as Financial Edge.

## Financial Stability

The Financial Stability program assists the community in a range of ways from providing down payment assistance for purchasing a home or providing counseling on home purchases, to issuing loans to small businesses, helping businesses write business plans and providing education opportunities.

* + - * Loan Client Intake and Management
      * Home Repair Client Intake and Management
      * Mortgage Assistance Client Intake and Management
      * Home Purchase Financial Counseling
      * Business Intake and Management
      * Business Plan Document Storage and Management
      * Geo Location of Addresses
        + GPS nets setting specific metropolitan areas
        + Layering Districts
      * Vendor Intake and Management
      * Educational Course Management
        + Creation
        + Registration
        + Local and Web based
      * Volunteer Management
      * Data Integration with Third Party systems such as Loan Management system

## Homeless

The Homeless Assistance Program provides help for things such as finding temporary homes for clients, rental assistance, homelessness prevention, home

inspection services for homes where rental assistance is provided, and other services provided by local government.

* + - * Rapid Rehousing Client Intake and Management
      * Rental Assistance Client Intake and Management
      * Homelessness Prevention Client Intake
      * Housing Search Assistance Management
      * Housing Inspection Management
      * Volunteer Management
      * Data Integration with Third Party systems such as current HMIS system
      * HIPAA Compliance

## Housing

The Housing Program helps homeowners with needs such as minor home repair, energy audit, single family rehab projects and weatherization.

* + - * Energy Audit Client Intake and Management
      * Weatherization Client Intake and Management
      * Minor Home Repair Intake
      * Minor Home Repair Project Management
      * Landlord Intake and Management
      * Weatherization Project Management
      * Energy Audit Project Management
        + Customizable calculations
      * Ability to add lifetime limits to the building for benefits
      * Job Costing
        + Ability to break job to different cost centers

Labor

Multiple Configurable hourly rates per project

Materials

Other

* + - * + Ability to assign funding sources to those cost centers
      * Vendor Bid Management
      * Weatherization Fund Management
      * Inventory Management
      * Workflow Management
      * Volunteer Management
      * Data Integration with Third Party systems such as current loan system
      * HIPAA Compliance

## Internal Resource Team

The Internal Resource Team manages things like conference room calendars, board and committee meetings, day to day office duties, routing incoming clients to the proper program and compiling and managing the high-level reports to the

board. Along with referral to internal resources, the team often needs to refer to outside resources such as *211*.

* + - * System Wide User Access for Information Lookup and Routing
      * Access to staff calendars
      * Referral Management
        + Capture referrals to external resources
      * Record and Manage “Reason for Call”
        + Record Time spent per call
      * Vendor Management
      * Vendor License Management
      * Volunteer Management
      * Data Integration with Third Party systems such as Financial Edge.

## Management Information Systems

The Management Information Systems team is there to support the day to day use of technology for AGENTS. This team needs to be able to manage and support the new system.

* + - * System Wide Administrative Access
      * Integration with Ticket Management System

### Project Management

Both AGENTS and the Vendor will be responsible for project management. The Vendor will assign a project manager to work with AGENTS’s project manager to ensure the project runs smoothly on both sides and to coordinate meetings between the teams as necessary.

### Warranty / Support

All customized software code written to meet the project needs will be warrantied for 6 months after Production Go Live. During this period, defects discovered in the customized code will be addressed and fixed through the development life cycle. The Warranty is considered part of the scope and limitations of the project and will not be billed separately.

Support will be available to AGENTS during working hours to be determined during contract negotiations but must include at a minimum 7AM-6PM Monday through Friday PST.

# HIGH-LEVEL PROJECT REQUIREMENTS

### Standards and Conventions

All software code written will comply with industry standards for code quality, documentation and quality assurance testing based on the software programming language used for implementation and to be agreed upon during contract negotiations.

### Project Management

The project will be managed by the Project Management Team at AGENTS with the following requirements:

* There will be 15-30-minute Project Management Status Check in meetings on the following days:
  + Monday – Plan for the week
  + Tuesday – Roadblock Check in
  + Wednesday – Check in on current weekly goals / roadblocks
  + Thursday – Roadblock Check in
  + Friday – Summarize week achievements / roadblocks
* Weekly Reports on Progress and Roadblocks required
* Monthly Reports on Progress and Roadblocks required Format to be determined, however must include Scope, Schedule and Budget color coded to Red, Yellow and Green for status
* Change Request Management Meetings for formal review and approval of anything outside the initial scope of the project as needed
* Should roadblocks or other needs arise, meetings to address the given situation will be set up
* Demonstrations will be given upon completion of software customizations

### Engagement Governance

* + 1. The Vendor must present a formal report on progress and accomplishments every week and month
    2. The monthly progress report shall include, at a minimum, the following information:
       - Project schedule fidelity
       - Project progress
       - Major accomplishments of the past week/month
       - Summary of risks and mitigation activities
       - Summary of issues and impacts
    3. Discovery of any risk documented/undocumented in the project plan shall be escalated to the above-mentioned AGENTS contact within one (1) day.

### Technical & Data Conversion Requirements

The respondent must demonstrate experience and capabilities with the technologies in use in the AGENTS ecosystem. The following section describes these technologies as well as the development and project management environment.

The Vendor is expected to provide the Software Development Life Cycle utilized for all customizations, this should outline the testing and deployment procedures of custom software needed to be completed to meet the needs of the project.

### Testing

Quality Assurance testing is the responsibility of the Vendor. New software will only be deployed to AGENTS after it has passed the Vendor’s internal QA testing at which point AGENTS team will perform User Acceptance Testing as the final stage of testing before the customization is certified for production use.

AGENTS Team will have access to the defect tracking system used during the QA lifecycle and will give final approval before any customization or defect resolution is migrated to the User Acceptance Testing environment.

Vendor to provide production deployment and post-production emergency support when any change is deployed to the production environment.

# VENDOR INFORMATION

This section specifies the requirements that submitting companies must address to participate in the vendor’s competition and receive work associated with this request for proposal. Provide a complete and accurate response to each requirement. If necessary, supporting documents can be attached as an appendix.

### Organization

* + 1. Provide an overview of your company, including date of incorporation, operating locations, number of employees, area(s) of specialty and number of successful projects with Non-Profit / Community Action Program customers.
    2. Are you a woman or minority owned business? Please indicate in your response if you are.
    3. Provide information about the specification of the project organizations with which you have experience (e.g., onshore, offshore, onshore PM, offshore dedicated development team, etc.).
    4. Describe how you screen and hire staff. What level of skill and certifications, if any, must they have? How do you evaluate their experience and performance? What was your staff turnover rate throughout the preceding three (3) years for each year? Do you require background checks on all employees? How often is a background check updated on existing employees? Do you employ any overseas resources?
    5. Describe the Software Development Life Cycle used for customizations, defects and system upgrades as would pertain to AGENTS customizations
    6. Describe Software Release cycle used for new features to the overall system. Do you release new features Quarterly, Bi-Annually, Annually? How often is the overall system updated for security patches?
    7. Describe server patching policy. If this is a cloud-based solution, how much planned down time is there per year, what hours or days is known down time typically planned

### Relevant Experience in Similar Projects

* + 1. Have you ever worked on projects for Non-Profit Community Action Programs with similar functionality? Please provide a brief description of the project, project scope, size of the team, duration of the project and project management model.
    2. What was the service and what was your role in the creation/deployment of the solution?
    3. Describe the success of this experience and whether or how lessons learned were implemented.

### Project Management

* + 1. Describe your experience levels and PMP Certifications with project management. How do you ordinarily scope, estimate, assign resources and measure progress?
    2. Do you use internal staff for project management or do you use third party system integration teams?
    3. Which software development lifecycle model would you choose for this project and why?

### Technical Experience

* + 1. Describe your experience with Visual Fox Pro, any past data conversion experience with this technology, are any team members certified.
    2. Describe your testing methodology and QA approach. Which testing tools and instruments do you use? Which methodologies do you use? What standard documentation do you produce during the development process?
    3. Provide the Software Programming Language used to develop the proposed system (Example: C++, Java, C#)
    4. Provide the Database Technology the proposed system requires (Example Oracle, SQL Server)
    5. Provide the target deployment platform operating system

### References

* + 1. Provide a minimum of three references within the past two years to whom products or services similar in scope to the requirements of this RFP have been provided, in the following form: the name of the person who may be contacted, position, email address and phone number as well as the main location physical address.

# VENDOR PROPOSAL

All vendors shall develop a proposal response to this RFP which addresses the full scope of work identified in the request. The following sections outline the mandatory elements of the proposal. In their proposal, bidders may include additional elements which are not specifically called out in this request, if they believe that such data is necessary for AGENTS to properly understand and evaluate the offering.

### Project Approach

Describe the approach you are taking towards this project. How do you propose to initiate, maintain and close out the project? Include specific references to the project methodology and the desired relationship between AGENTS and your company.

### Staffing Proposal

Describe the skill sets, numbers and locations of the individuals you propose to staff this project. Briefly provide an overview of the contributions you would expect each unique skill set to provide to the project.

### Project Timing Proposal

Based on the approach and staffing outlined above, provide a project timeline that commences with a contract award date of 12/3/2018 This timeline should identify all major project milestones and indicate the dates associated with the project deliverables in Section 5.5 Overview of Deliverables.

Describe your estimating methodology and the methods you employed to determine the effort associated with this project. Provide sample data from your estimating process to illustrate this methodology.

Provide the total number of hours associated with the following tasks/resources:

* Total Project Hours
* Project Management
* Software Engineering/Development needed for Customizations
* Testing & QA
* Software Warranty
* Infrastructure Management

### Project Cost Proposal

Provide a cost proposal which includes the total cost to be charged as well as the cost broken down by the following categories:

* Initial Software Cost by Module
* Customization
  + Itemized per customization
  + Group customizations which are required together
* Installation and Configuration
* Post Project Support
* Training
* Any Recurring Costs

Provide a schedule of hourly rates for the various roles and skill levels to be assigned to this project.

### Proposal Assumptions

List any assumptions you have made regarding how you will execute the project or regarding the activities of AGENTS in executing this project, or any other assumptions you may have made.

### Proposal Risks and Mitigations

List any risks you have identified associated with this project. Indicate your best assessment of the likelihood and impact (High, Medium, Low). Identify the proposed response to those risks:

* Accept the risk
* Mitigate the risk with appropriate mitigation details

### AGENTS Time and Support

Provide any requirements for AGENTS time and resources that will be required to support the project effort. Be clear about the skill sets and types of interaction required from AGENTS.

# METHOD OF EVALUATIONS AND AWARD

All proposals received will be logged and accepted into the process. Only those answering all items in the Vendor Proposal (6.x) and Evaluation Criteria (7.1) will be considered for evaluation. All non-conforming proposals will be indicated as “Disqualified”.

### Evaluation Criteria

An evaluation team composed of AGENTS employees and other stakeholders will review the proposals. The following criteria will be used to evaluate the proposals for the purpose of ranking them in a relative position based on how fully each proposal meets the requirements of this RFP.

Items to be included on the will include:

* Overall Initial Cost
* Yearly Costs
* Time to Implement
* Customer Service References
* Ability to expand system to meet future needs
* Training offering / ease of implementation
* Woman or Minority Owned Business

Along with the above, the items from section 3.3 of this RFP will be scored using a point system:

The point system will work as follows (0-5):

1. The proposed system cannot meet the requirement and no customization or third-party integration is available to meet the criteria.
2. The proposed system cannot meet the requirement, and no customization can be added to meet the requirement, however an additional software

purchase is available to integrate with the proposed system to meet the requirement.

1. The proposed system cannot meet the requirement; however, a major software development effort, customization or module can be added to the proposed system and / or an additional software purchase is available to integrate with the proposed system to meet the requirement.
2. The proposed system does not currently meet the requirement (50%-80% functionality available), however existing modules can be utilized and customized to meet the requirement, no additional software purchase or major software development effort required
3. The proposed system somewhat meets the requirement (80% functionality available), the existing module or component can be customized slightly to meet the requirement.
4. The proposed system fully meets the requirement with no customization necessary.

For example:

1. The system does not allow for purchase orders and cannot integrate with any purchase order modules available for AGENTS to purchase.
2. The system does not allow for purchase orders, but for purchase order processing it recommends and can integrate with Purchase Order System A if AGENTS were to purchase that separate software
3. The system does not allow for purchase orders, but we have a software team available to build the Purchase Order Module to meet the requirement specifications AGENTS has outlined and integrate with the system.
4. The proposed system has a purchase order module; however, it is designed for a different type of industry or organizational unit, our software team can expand on our existing purchase order module to meet the requirement of AGENTS
5. The proposed system has a purchase order module for your industry and or organizational unit, however the specifics of how the team at AGENTS needs to process purchase orders will need our software team to make updates to meet the business requirement fully.
6. The proposed system has a purchase order module that works exactly as needed in the requirement, however there are some fields missing that we can easily add with our existing Custom Field process that does not require any software development customization to be made.

### Discussions and Best and Final Offers

AGENTS may, at its sole option, either accept a vendor’s initial proposal by award of a contract or enter into discussions with vendors whose proposals are deemed reasonably susceptible of being considered for an award. After discussions are concluded, vendors may be allowed to submit a “Best and Final Offer” for consideration