



Economic Opportunities Advancement Corporation of Planning Region XI
Request for Proposal for Client Tracking Software

PROPOSAL DUE
September 19, 2025

Attn: Kanisha Johnson
Director of Community Programs
Kanisha.johnson@eoacwaco.org

Economic Opportunities Advancement Corporation of Planning Region XI
1800 N. Valley Mills Dr.
Waco, TX 76710

Vendors are required to provide as much detail as possible in this proposal, regarding scope of services, approach to protecting and securing the technology used by EOAC users and their capability and experience. EOAC will utilize evaluation and selection criteria, based on EOAC's standard proposal process, to determine an acceptable vendor. EOAC reserves the right to reject any or all proposals or to accept any proposal considered most advantageous.

Economic Opportunities Advancement Corporation of Planning Region XI
1800 N. Valley Mills Dr. | Waco, TX 76710 | 254.753.0331

Introduction:

The Economic Opportunities Advancement Corporation of Planning Region XI is a private, non-profit, 501(c)3, Community Action Agency established in 1966, and receives state, federal, and private funding. The goal of EOAC is to reduce poverty and empower individuals and families in Heart of Texas by providing resources, support, and opportunities that lead to self-sufficiency. The organization does this by administering comprehensive assistance programs that support families and individuals, during this transition period. EOAC's service area includes 9 urban/rural counties with the administrative office located in Waco, Texas.

Purpose:

The purpose of this bid solicitation is to obtain client tracking software to effectively and efficiently manage the required data collection and reporting of client outcomes and financial assistance for services provided through the LIHEAP Database, Comprehensive Energy Assistance Program, Community Services Block Grants, and Weatherization Program with the potential to expand the platform if funding from other agencies is received that would require specific data collection.

Submission Requirements:

Responses to the Bid Solicitation must contain the following information:

- I. The software must allow EOAC to collect client data to meet eligibility and reporting requirements according to the Texas Department of Housing and Community Affairs rules. The vendor must update software based on all federal and state regulation changes in a timely manner.
- II. Software Specifications:
 - A. Internet Based
 - B. Licenses Available for up to 20 Users
 - C. Technical Support and Upgrades included
 - D. Case Management section to include case notes
 - E. The most recent Family National Performance Indicator (FNPI) collection mechanism and required reports, including but not limited to: FNPIs, SRVs, For example (Module 4 of the CSBG Annual Report)
 - F. Ability to generate/print/export reports by county or collectively, and to create custom reports by the user.

- G. Transfer data from current EOAC client tracking software
- H. System must allow for scanning of documents and photos in case files with cloud storage
- I. The system must create single and multiple Notices of Payment per client
- J. The system must be compatible with exporting payment information to the user's accounting software
- K. The system must maintain financial data relevant to program expenditure per client
- L. System should maintain budget balances per funding program
- M. The system must allow for user-identified questions and multiple assessments for client households
- N. From data collected in "Needs Assessment," system should have option for graphical reports to show client's progress
- O. System should allow drill down from the unduplicated reports to show client names and IDs that constitute the number on the unduplicated reports
- P. The system must create an audit trail for all entries and record updates
- Q. The system must allow for printing a paper record of a complete client file
- R. The system must adjust client files for program expenditure refunds
- S. It must contain a double-end referral system, i.e.: referral, and follow-ups
- T. Reporting System to meet TDHCA requirements for CSBG, CEAP, WAP, LIHEAP reporting as well as future programs that may be developed.
- U. Must attach sample voucher / notice of payment for CEAP
- V. As per the requirement of state of Texas, proposed system should be able to create the CEAP, WAP, CSBG report file for upload to TDHCA web site
- W. Ability for EOAC clients to access & complete unified application for all programs on-line and submit a completed application along with supporting documents
- X. The system should allow clients to sign intake documents electronically and system should maintain a copy of the electronically signed client intake document for audit purposes.
- Y. System must use a secure HTTPS protocol
- Z. The vendor must offer on-site/virtual training for initial use as part of this bid. Future trainings' price must be reasonable and negotiable.

III. Pricing

A. Software Cost: _____

B. Licensing Fees: _____

C. Annual Maintenance Cost:	1 st Year	_____
	2 nd Year	_____
	3 rd Year	_____
	4 th Year and beyond	_____
D. Other: Specify		_____
E. Discounts:		_____
F. Budget Allocation Management		_____
G. Financial Module – compatible with accounting software		_____
H. Forms Designer		_____
I. Data Storage Fee/Cost		_____
J. Initial Training Fee		_____
K. Future Training Fee		_____
Total Costs:		_____

****** All bid packets must include detailed marketing collateral.**

Any equipment specifications necessary to install, operate and maintain the software must be included in the proposal.

Rejection of Bids:

EOAC reserves the right to reject any or all submissions, in whole or in part, for any reason without incurring any costs or liability whatsoever. All bids will be reviewed for completeness of the submission requirement. If a bid fails to meet a material requirement in the bid solicitation it will be considered incomplete.

All bids may be rejected in any case where it is determined that the bids are not competitive or where the cost is not reasonable.

Bids that contain false or misleading statements may be rejected if in EOAC's opinion the information was intended to mislead EOAC regarding a bid requirement.

Proposal Instructions:

The bid must be submitted no later than **5:00 p.m. on September 19, 2025**. Proposals received after that date will not be considered. It is the responsibility of the bidder to ensure that the proposal is received by EOAC by the deadline. Bids can be emailed to **Kanisha Johnson** at **kanisha.johnson@eoacwaco.org** or mailed to: **Economic Opportunities Advancement Corporation Attn: Kanisha Johnson, Director of Community Programs 1800 N. Valley Mills Dr., Waco, TX 76710**. Bids can also be delivered in person at **1800 N. Valley Mills Dr., Waco, Tx 76710**. Mailed bids should be postmarked in time to arrive by the submission deadline.

Evaluation and Review of Proposals:

Bids will be opened at the EOAC Executive office located at 1800 N. Valley Mills Dr., Waco, TX at **11:00 a.m. on Monday, September 22, 2025**.

All proposals will be evaluated based on a point system by a committee appointed by the Executive Director. Efforts will be made by the Economic Opportunities Advancement Corporation to utilize small businesses, minority-owned businesses, and other Historically Underutilized Businesses (HUB). EOAC will not discriminate regarding race, color, creed, sex, religion, national origin, disability, marital status, parenthood, or age.

The following criteria will be used for evaluating each proposal:

- Overall product quality
- Suitability of the software to meet the required data collection and reporting needs of the Agency as it relates to the agency's mission.
- Cost
- Customer service and support (References, Retention, Measured services rates)

Factors	Proposal Points
Prior experience working with Community Action Agencies	0-10
Prior Experience working with non-profits	0-5
Knowledge of federally funded assistance programs, Family National Performance Indicators, and transitioning out of poverty	0-10
Results of references – Integrity and resources	0-15
Minority/Small business/HUB	0-10
Support System	0-5
Cost of Annual Maintenance	0-10
Discounts	0-5
Price	0-30
Maximum points	100

EOAC reserves the right to select the proposal that is most advantageous to the Agency.

Notification of award:

Upon conclusion of final negotiations with the successful bidder, all bidders submitting proposals in response to this Bid Solicitation will be informed in writing of the name of the successful bidder.

Amendments:

The successful vendor must be willing to amend its offering under this contract to reflect the changes in technology and services during the course of the contract period. A secondary goal is for the awarded vendor to partner with the agency to ensure effective & efficient use of the system.

Protest Procedure:

Any protest regarding this solicitation process must be submitted in writing to the EOAC Executive Director no later than ten (10) days from the notice of outcome.

The initial protest must contain a complete statement of the basis for the protest. The protest must state the facts and refer to the specific portion of the document or the specific statute that forms the basis for the protest. The protest must include the name, address, and telephone number of the person representing the protesting party.

The procedure and time limits set forth in this section are mandatory and are the bidder's sole and exclusive remedy in the event of a bid protest. The bidder's failure to fully comply with these procedures shall constitute a waiver of any right to further pursue the bid protest.

Questions:

Inquiries concerning this Bid Solicitation should be directed to **Kanisha Johnson, Director of Community Programs** in writing at kanisha.johnson@eoacwaco.org. Deadline for questions is Friday, September 12, 2025 by 5:00pm.

SPECIFICATIONS

Section 1.0 – Executive Summary

This part of the response to the RFP should be limited to a brief narrative highlighting the bidder's proposal. The summary should contain as little technical jargon as possible, should be oriented toward non-technical personnel, and be no more than 2 pages.

The complete name of the firm or person(s) submitting the proposal, the main office address, and the primary and secondary contact person(s) and their respective telephone numbers and email addresses should be included in this section.

Section 2.0 – Vendor Background and Qualifications

Provide narrative responses to the following questions, including any necessary documentation, for each item listed below.

1. Specify the number of years the Vendor has been in the non-profit sector software business.
2. Provide information on product implementations and success of data transfer of prior software products.
3. Provide a brief statement of the company's background demonstrating longevity and financial stability.
4. Describe the seniority, tenure, and background of the senior management team.
5. Describe your customer support procedures and the typical interaction that can be expected on a customer support call.
6. Specify the number of years vendor has been in Community Action Software Business.
7. What metrics do you use to evaluate the quality of customer service and response time on support calls?
8. Describe the company's commitment to research and development for the Community Action agency's application being proposed.

Section 3.0 – Customer References

Please provide a list and reference information for all agencies in Texas that use your software.

References (Please add more if needed):

Company Name: _____

Contact Person: _____

Address: _____

Phone #: _____

Company Name: _____

Contact Person: _____

Address: _____

Phone #: _____

Company Name: _____

Contact Person: _____

Address: _____

Phone #: _____

Company Name: _____

Contact Person: _____

Address: _____

Phone #: _____

Company Name: _____

Contact Person: _____

Address: _____

Phone #: _____

Section 4.0 – Response to Software Requirements

1. Describe how the proposed software meets the Functional Requirements provided in General Requirements and what, if any, alternate or optional requirements are met.
2. Describe how the reporting system works and what tools are included for creating custom reports.
3. Describe the administration of application security. Include how it is configured, how groups or roles are used, and what actions can or cannot be taken for various settings, etc.
4. Describe how your solution creates an “audit trail” when data is changed. Include the types of data for which a trail is created, and what is recorded (user id, date, etc.) when the data is changed.

Scoring of points will be on a competitive basis. We will have a list of questions for the references. Point values will be added to form the totals.

Section 5.0 – Contract Length

The contract period shall be guaranteed for 3 years (36 months) with extensions at both parties’ discretion and may be extended on a yearly basis.

Is Firm a Certified HUB: _____ Please provide proof of certification.

Is the Firm on the state or federal Debarment/exclusion list?

Does Firm have any relationships that would be considered a conflict of interest involving any EOAC Board member, employee, or vendor? _____

If yes, describe the relationship below in **"Attachment A."**

If Attachment A is signed, Firm indicates no conflict of interest exists.

Certification

I hereby certify that the information provided above is true and correct. I hereby certify that the prices quoted above are true and correct and shall remain in effect for the contract period of three years and may be extended on a yearly basis. I understand that EOAC is a non-profit agency and is exempt from state and local taxes and have therefore not included taxes in the pricing provided above.

Authorized Agent

Date

Attachment A

Does your firm have any conflict of interest involving any EOAC Board member, employee, or vendor? Please Describe:

If none, please sign here: _____