



Economic Opportunities Advancement Corporation (EOAC) of Planning Region XI

REQUEST FOR PROPOSAL (RFP) CLIENT TRACKING SOFTWARE

EOAC seeks a versatile and proven client tracking software to effectively and efficiently manage the required data collection, reporting and communication of client, customer and student information across the various programs of our Community Action Agency.

The Economic Opportunities Advancement Corporation (EOAC) of Planning Region XI is a private, non-profit, 501(c)3, Community Action Agency with the mission to empower low-income families and individuals by helping them transition out of poverty and become self-sufficient. The agency receives federal, state and private funding to provide comprehensive social service programs that support individuals during this transition period. Currently EOAC administers five major programs across nine counties.

I. Statement of Qualifications

The competent client tracking software provider will possess experience with human service organizations and educational centers, as well as the tracking and reporting of state and government required performance outcomes and funding.

II. Scope of Work

A. The contracted software will allow for the collection, reporting and communication of data across the agency, including:

Phase 1: Client/customer outcomes and financial assistance for services provided through the Comprehensive Energy Assistance Program, Community Services Block Grant, and the Weatherization Assistance Program

Phase 2: Charter School parent and volunteer activities; Childcare Services reports

Phase 3: Head Start/Early Head Start Program

B. In addition, the selected software would also, as much as possible, allow EOAC to pull and share information from other mandated-use software employed by other EOAC programs. (Contracted software would replace current Info-Maker software.)

C. The software must allow EOAC to collect client data to meet eligibility and reporting requirements according to the rules of the Texas Department of Housing and Community Affairs (TDHCA), the Office of Head Start, and the Department of Energy (DOE).

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- D. Vendor must update software based on all federal and state regulation changes in a timely manner.

III. Software Specifications

- A. Licenses available for 10 - 30 users
- B. Reporting System to meet TDHCA contracted reporting requirements for Community Services Block Grant (CSBG), Comprehensive Energy Program (CEAP) and Weatherization Assistance Program (WAP)
- C. Reporting system to meet Office of Head Start reporting requirements for Head Start/Early Head Start
- D. Technical support and upgrades included
- E. Case Management section to include case notes
- F. Forms Designer; flexibility to create - at a minimum - vouchers, purchase orders and/or notice of payment forms
- G. Ability to print any number of reports from the data provided, including graphs and charts
- H. Transfer legacy data from current client tracking software
- I. Financial Module- compatible with MIP Software
- J. Budget allocation management

IV. Submission Requirements

Vendors are encouraged to avoid vague generalities but provide as much specifics as possible in their responses regarding their experience and capabilities. Proposals should contain as little technical jargon as possible, should be oriented toward non-technical personnel, and must contain the following information:

Section 1. Vendor Overview

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. Vendor Background and Qualifications

Provide narrative responses and any necessary documentation for each item listed below.

1. Specify the number of years the vendor has been in the human services/client tracking software business.
2. Provide a brief statement of the company's background demonstrating longevity and financial stability.
3. Provide information on product implementations and success of data transfer of prior software products.
4. Provide examples of work in the fields of human services case management, public education and childcare.

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5. Provide examples of any work with government-funded energy assistance such as LIHEAP/CEAP/DOE.
6. Provide examples of any work with entities who had/have state/federal reporting requirements.

Section 3. Customer References and Customer Support

1. Please provide at least four (4) customer references that are representative of the requested system and scope of work. Include contact name, phone and email address.
2. Describe your customer support procedures and the typical interaction that can be expected on a customer support call.

Section 4. Response to Software Requirements

1. Describe how the proposed software meets the requirements described in the Scope of Work and Software Specifications (sections II and III).
2. Describe your infrastructure and administration of application/data security.
3. Describe any equipment specifications necessary to properly install, operate and maintain the software.

V. Software Demonstration

Considered software providers must be able to present to EOAC a demonstration of the client tracking capabilities and ability to meet the Scope of Work (II & III) outlined above.

VI. Proposed Cost of Services

Your proposal must include your firm's estimated cost for the activities identified in the Scope of Work. Please distinguish the cost of services based on the phases of work described in the Scope of Work. Include and itemize costs for:

- Initial System Development and Configuration
- Import of Legacy Data
- Licensing Fees
- Monthly Hosting and Support (1st, 2nd, 3rd year and beyond)

VII. Evaluation Criteria

EOAC will utilize evaluation and selection criteria to determine an acceptable vendor. EOAC reserves the right to reject any or all proposals or to accept any proposal considered most advantageous to the agency and its mission. EOAC will not use the lowest bid as the sole basis for selecting the best vendor. Proposals will be evaluated and ranked according to the following criteria:

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Criteria	Proposal Points
Ability to Meet Scope of Work	35
Infrastructure and Security	10
Experience with Federal Reporting Requirements	10
Results of References	10
Hosting and Support	15
Price	20
Maximum points	100

VIII. Deadline for Submission

Proposals will be accepted no later than 5:00pm November 23rd, 2018.

Interested vendors should submit one original and 6 copies of their proposal response documentation to:

Julia McDonald
EOAC
500 Franklin Avenue
Waco, TX 76701

ATTENTION: RFP CLIENT TRACKING SOFTWARE

Inquiries concerning this RFP should be directed in writing to Julia McDonald, Director of Community Services and Resource Development at Julia.mcdonald@eoacwaco.org. Proposals received late or incomplete will not be considered.

IX. Negotiations

EOAC reserves the right to negotiate with any and all individuals or vendors that submit proposals, as per the Texas Professional Services Procurement Act and the Uniform Grant and Contract Management Standards.

X. Notification of Award

Upon conclusion of final negotiations with the successful vendor, all vendors submitting proposals in response to this RFP will be informed in writing of the name of the successful vendor.