



## **Request for Proposals: Data Management Services**

First 5 Ventura County (F5VC) is soliciting proposals for a qualified contractor/vendor to provide a web-based platform for collecting program participant demographic, services and assessment data, case management with closed-loop referral abilities, funding application, grants management and reporting systems, along with technical assistance and support services to meet our data and fiscal reporting requirements.

To be considered, proposals must be received by **4:00 PM on April 16<sup>th</sup>, 2021**. Late responses will not be considered.

**Proposals will only be accepted via email to: [assistant@first5ventura.org](mailto:assistant@first5ventura.org).**

All proposals received will be provided a receipt for their submission by email confirmation. If you do not receive an email confirmation, or you wish to call and verify receipt, you may contact Fahim Farag at: (805) 684-9990.

Any questions concerning this Request for Proposals (RFP) should be submitted by no later than **April 2<sup>nd</sup>, 2021** and directed to:

Sam McCoy  
Director of Program and Evaluation  
[smccoy@first5ventura.org](mailto:smccoy@first5ventura.org)

All questions and answers will be posted on the F5VC website: [www.first5ventura.org](http://www.first5ventura.org).

### **Background**

F5VC promotes school readiness through investments in health, early learning and family strengthening, benefitting children from prenatal to 5 years of age and their families. An independent public entity, F5VC is largely funded through the California Children and Families Act, a tobacco tax dedicated to developing locally managed resources and systems that improve health and education for children 0-5, passed by the voters of California in 1998. In addition to tobacco tax revenue, F5VC is funded through leveraged state and federal dollars, grants, and charitable donations.

The California Children and Families First Act requires outcome-based accountability and evaluation from local commissions. Each county commission is required to submit an Annual Report to the First 5 California Commission by November 1st. The Annual Report provides basic data about client demographics, service delivery counts, program highlights, and expenditure information. In addition to the State Annual Report, F5VC engages in evaluation activities in order

to describe and demonstrate the effectiveness of services provided, and inform decision-making about First 5 investments in the community. Evaluation activities are used to help guide program development, implementation, and continuous quality improvement efforts.

F5VC is looking to identify a web-based data management platform to implement an online intake, enrollment, and data management system. The system will allow for the collection of client level data, aggregate data, service data and assessment data in order to complete state and local reporting requirements, ensure accurate monitoring for accountability, evaluate outcomes, guide continuous quality improvement efforts and potentially allow for contract and grant management.

### **Scope of Work / Deliverables**

F5VC is seeking an experienced contractor who will be able to demonstrate their qualifications and relevant experience to provide a web-based data collection and reporting system, along with associated data support services including the activities and deliverables included in the following scope of work. The selected contractor will be able to fulfill the required functions outlined below:

#### 1) Individual Client & Family Database

- a. The database will have capacity for core client and aggregate data collection, specifically including tracking of individual and family program data with unique client and family identifiers, customizable demographic data, services and assessment collection.
- b. The platform should include a user-friendly case management system and family-intervention tracking that allows for the integration of a closed loop referral system.
- c. The system should be able to allow for client communication abilities including a family access portal with client's direct access to personal information, direct messaging capabilities, and a secure platform to complete forms and assessments that allow for electronic signature.
- d. The system will have the capability to maintain a customizable resource directory for appropriate referral for Help Me Grow initiative.

#### 2) Reporting, Evaluation and Continuous Quality Improvement

- a. The database will have the capacity to provide various, easily customizable reports for F5VC staff and partners to review and analyze all data collected.
- b. Platform should be able to provide additional analytical tools necessary for implementing evaluation activities, including customizable raw data exports, as defined as necessary by F5VC staff and/or external evaluator.
- c. Platform will be expected to easily provide accurate data exports for First 5 California in a manner that is consistent with existing State requirements.

#### 3) Interoperability and Security

- a. The system must be HIPAA compliant, including security features with the ability for customizable configuration and deployment of user permissions and system level access.
- b. Provide comprehensive data management functions for the data system, including activities such as regular backups of the entire F5VC database.
- c. System will allow for Application Programming Interface (API) connections and for system customization to align with other data systems, such as iPinwheel, DRDP Tech, UniteUs, ETO, etc.

- d. Accommodate the transfer of existing data from the currently used web-based data systems, if necessary, taking into account consents for the use of the data and related agreements.
- 4) Training and Technical Assistance
- a. Contractor will be expected to provide customer support and technical assistance for F5VC staff and funded partners on the data system, including data administration activities, providing a user guide, establishing user profiles and appropriate levels of access consistent with F5VC policies and procedures.
  - b. Contractor will provide trainings and technical assistance services in the use of the database system for all staff, funded partners, and evaluators as needed.
- 5) OPTIONAL MODULE/COMPONENT(S): Online grantee/contractor fiscal reporting, contract document management, and funding application capability
- a. The system will provide a fiscal reporting and invoicing platform whereby F5VC would establish budget line items and grantees/contractors will enter expenses for the reporting period and submit supporting documentation by authorized grantee/contractor users. The system will securely store data and be able to generate an invoice for payment processing by F5VC.
  - b. The system will allow F5VC users and grantee/contractor users to securely upload and store documents, e.g., insurance certificates and to download various forms and documents.
  - c. The system will provide a portal for prospective grantees to submit applications for funding and to upload supporting documents with a secure digital signature.

### **Qualifications and Experience**

Must have experience working with large government organizations and/or experience working with county First 5 Commissions or other public agency programs.

The ideal contractor/ vendor will have the following qualifications:

- Recent and long-term experience as a vendor of client case management systems that includes a web-based intake, enrollment and data management system.
- Experience working with large government organizations and/or experience working with county First 5's or other child/family centered programs.
- Strong expertise in technical assistance services associated with utilization of the data system by a variety of users, including data administration activities, a user guide, establishing user profiles and appropriate levels of access consistent.
- Demonstrable knowledge of database interoperability and Application Programming Interface (API) functionality that allow for system customization to align with other data systems.
- Ability to enter into a contract with First 5 Ventura County and implement the Scope of Work as defined in this proposal.

## **Time Considerations and Requirements**

1. To be considered, proposals must be received by F5VC by 4:00pm on **April 16<sup>th</sup>, 2021**. Late proposals cannot be accepted.
2. The contract is scheduled to be awarded by no later than **May 21<sup>st</sup>, 2021**.
3. Based on the proposals received, selected applicants may be asked to participate in an additional interview process.
4. The time period for implementing this project is expected to begin by June 1<sup>st</sup>, 2021 with the database setup completed and ready to launch by no later than September 30<sup>th</sup>, with a preference for implementation sooner.

## **Proposal Requirements**

In 10 pages or less, provide a proposal that addresses the following:

- Experience:
  - Describe your qualifications and your past and current experience with similar work as outlined in this Request for Proposals.
- Strategy:
  - Provide a complete description of the proposed database system, its basic functions and features and how those functions fulfill the requirements in the Scope of Work section.
  - A proposed work plan and timeline implementing the database by no later than September 30, 2021. Timeline should identify major tasks needed to implement and maintain the data management system, the start and end date for each task and the person in-charge of completing each task.
- Cost:
  - Proposals must include complete and detailed budget for implementing the Scope of Work and ongoing annual costs for the web-based data management system that includes storing and maintenance of data. In addition, the budget will include any additional training and implementation costs, additional products or modules, on-going standard data storage and maintenance costs and limits. All proposals must include the per user month/annual cost.

## **Additional Required Information:**

- **Primary Contact Person** - include the email, mailing address, and phone number of the primary contact person.
- **Resumes** – include the resumes of all staff expected to work on this project, delineating roles of each staff member in the proposed project.
- **List of References** – provide a listing of the names, addresses, telephone numbers, email addresses (if applicable), and agency contacts of three (3) former clients and the title of the project completed. F5VC may contact some or all of the bidder's references as part of its review process.
- **Example of Prior Work** – items that help visually demonstrate the database will be accepted, including screenshots or a short video preview (less than 10 minutes). Large files may be shared to **assistant@first5ventura.org** via Dropbox or Google

Drive.

### **Evaluation of Proposals**

Proposals will be evaluated to ascertain which contractor best meets the needs of First 5 Ventura County. Oral interviews may be necessary to assist in making the final selection.

Evaluation considerations will include the following:

- Qualifications, experience, and professional activities of the contractor; past performances of the contractor on work previously performed for governmental agencies or non-profits comparable to First 5 Ventura County.
- Proposal demonstrates a clear understanding of the work to be performed and the proposed timeline is reasonable.
- Cost, although a significant factor, may not be the dominant factor. Cost is particularly important when all the other evaluation criteria are relatively equal.

The award will be made to the consultant/contractor/firm, which, in the opinion of First 5 Ventura County, is best qualified.

F5VC may, at its sole discretion, reject any or all proposals submitted in response to this RFP. Failure to comply with the specifications of this solicitation shall be grounds for disqualification. F5VC also reserves the right to cancel this RFP at its sole discretion, at any time prior to execution of an agreement or contract. F5VC shall not be liable for any costs incurred in connection with the preparation of any proposal submitted in response to this solicitation.

After selection of contractor, F5VC reserves the right to enter negotiations with the contractor for additional work and/or to further define work requirements.