

**CORNERSTONE**

**COMMUNITY ACTION AGENCY**

**RFP**

**Client Tracking Software**

**Proposals Due:**

**December 15, 2022**

**Direct all Submission Items to**:

Shenika Arredondo

Cornerstone Community Action Agency

114 Needham

Coleman, TX 76834

325-625-4167

Contents

[I. INTRODUCTION 3](#_Toc15716)

[A. Background Information 3](#_Toc15717)

[B. Purpose 3](#_Toc15718)

[C. Inquiries 3](#_Toc15719)

[D. Interpretations and Adenda 3](#_Toc15720)

[E. Scope 3](#_Toc15721)

[II. PROPOSAL SUBMITTAL GUIDELINES 4](#_Toc15722)

[III. PROPOSAL REQUIREMENTS 4](#_Toc15723)

[A. Submission of Proposal 4](#_Toc15724)

[B. Schedule 5](#_Toc15725)

[C. Property of Cornerstone Community Action Agency 5](#_Toc15726)

[D. Evaluation of Proposals 5](#_Toc15727)

[E. Quiet Time 5](#_Toc15728)

[F. Selection Process 6](#_Toc15729)

[IV. ADDITIONAL TERMS AND CONDITIONS 6](#_Toc15730)

[A. Statement of Confidentiality 6](#_Toc15731)

[B. Incurring Costs 6](#_Toc15732)

[C. Negotiations 6](#_Toc15733)

[D. Hold Harmless Agreement 6](#_Toc15734)

[E. Guarantee 7](#_Toc15735)

[F. Small and/or Minority-Owned Businesses 7](#_Toc15736)

[G. Non-Discrimination and Equal Opportunity 7](#_Toc15737)

[V. Attachment A 8](#_Toc15738)

[A. Minimum Standards to Include in Proposal 8](#_Toc15739)

[B. Submission Requirements 8](#_Toc15740)

[VI. Attachment B 10](#_Toc15741)

[A. Evaluation Criteria/Rubric 10](#_Toc15742)

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# I. INTRODUCTION

## A. Background Information

Cornerstone Community Action Agency (CCAA) is a private non-profit corporation established in 1965 and funded through federal, state and local grants. Cornerstone Community Action Agency’s Mission is, A Community in action, empowering people, changing lives and offering hope to achieve self-sufficiency. Cornerstone Community Action Agency is the local Community Action Agency for Brown, Callahan, Coleman, Comanche, Eastland, Jack, McCulloch, Parker, Palo Pinto, Runnels, and Wise counties.

More information on Cornerstone Community Action Agency can be found at www.cornerstonecaa.org

## B. 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 Comprehensive Energy Assistance program(CEAP), Community Service Block Grant (CSBG), Tenant Based Rental Program, (TBRA) Veterans and Families General Assistance Program, (VFAP), Texas HAF grant for Mortgage Assistance and various other programs.

## C. Inquiries

Questions about the RFP should be directed in writing, via email to

shenika@ctoinc.org. No questions other than written via email will be accepted,

and no response other than written will be binding upon Cornerstone Community Action Agency.

## D. Interpretations and Addenda

No interpretation or modification made to a respondent as to the meaning of the RFP shall be binding to CCAA, unless submitted in writing and distributed as an addendum by CCAA. Interpretations and/or clarifications shall be requested in writing and directed to Shenika Arredondo, Community Service Director at the email noted above. Information otherwise obtained will not be considered in awarding of the contract. All addenda shall become part of the RFP.

## E. Scope

Refer to Attachment A

# II. PROPOSAL SUBMITTAL GUIDELINES

Proposals should be as brief and concise as possible, providing relevant information and excluding marketing materials. Each proposal must include all of the following content in each of the following sections:

* **Cover Letter:** Brief one-page cover letter should summarize key elements of the proposal. Cover letter should include the name, address and telephone number of the proposer and all key personnel that will assist in providing the requested service. The letter should be signed by an individual authorized to submit the required information to Cornerstone Community Action Agency.
* **Vendor Information Page:** An individual authorized to bind the bidders firm must sign the vendor information page. Indicate the address and telephone number of the contact person for this assignment.
* **Individual/Company Experience and Qualifications:** Provide a brief history of experience, including the number of years in business, bonding information (if applicable), and the number of years providing the type of proposed services.
* **A statement** warranting that all persons providing services to Cornerstone Community Action Agency. are legally authorized to work in the United States.
* **Software Pricing:** Pricing to include all applicable pricing, including but not limited to licensing fees, annual software costs, maintenance fees, technical assistance, and additional software enhancement options.
* **References:** provide the names and contact person of your firm’s three most relevant references for which your firm has provided services comparable to the services described herein over the past three years. At a minimum, the following information should be included for each reference:
  + Name, address, and contact information, including email address
  + Description and scope of work, length of time as software service provider to reference

# III. PROPOSAL REQUIREMENTS

## A. Submission of Proposal

One original and two copies of the proposal must be submitted no later than 4:00 p.m. on Thursday December 15, 2022. Proposals received after that date will not be considered. It is the responsibility of the bidder to ensure that the proposal is received by Cornerstone Community Action Agency by the deadline. Sealed proposals should be addressed and mailed or delivered to: **Shenika Arredondo Cornerstone Community Action Agency 114 Needham Coleman, TX 76834. Proposals may be emailed to: shenika@ctoinc.org**

## B. Schedule

|  |  |
| --- | --- |
| RFP Notification | November 30, 2022 |
| Deadline for questions | December 09, 2022 |
| Sealed Responses Due | December 15, 2022 |
| Announcement of Intent to Award | December 20, 2022 |
| Estimated Contract Start Date | January 01, 2022 |

Questions concerning the RFP are due in writing via e-mail to Shenika Arredondo,

Community Service Director, at shenika@ctoinc.org by 5:00 p.m. on December 9, 2022

## C. Property of Cornerstone Community Action Agency.

All copies and contents thereof of any proposal, attachments, and explanation thereto submitted in response to this RFP, except copyrighted material, shall become the property of Cornerstone Community Action Agency. regardless of the proposer selected. All copyrighted material must be clearly marked indicating the copyright status. Cornerstone Community Action Agency. shall be held harmless from any claims arising from the release of proprietary information not clearly designated as such by the proposing firm.

## D. Evaluation of Proposals

Proposals will be evaluated on the basis of their responses to all provisions of this RFP. Cornerstone Community Action Agency. may use some or all of the criteria in its evaluation and comparison of proposals submitted. The criterion listed is not necessarily an all-inclusive list. The percentages listed are intended to provide a basis for evaluation, but may change in the best interest of Cornerstone Community Action Agency.

## E. Quiet Time

The proposer and its agents, officers, principals, and employees will not engage in any written or verbal communication during the selection period between the proposer, or any individual assisting the proposer to be selected and the Cornerstone Community Action Agency. Board of Directors or any Cornerstone Community Action Agency. employee, whether or not such individual or employee is assisting in the selection of the proposer, regarding the merits of the Proposer or regarding whether Cornerstone Community Action Agency should retain or select the proposer.

Violations of these Quiet Time provisions may result in disqualification.

## F. Selection Process

Cornerstone Community Action Agency will review proposals and enter into negotiations with one or more finalist until a contract is signed.

# IV. ADDITIONAL TERMS AND CONDITIONS

## A. Statement of Confidentiality

Proposer agrees that any information accessed or gained in performance of those duties will be maintained in absolute confidence and will not be released, discussed, or made known to any party or parties for any reason whatsoever, except as required in the conduct of duties required, or where disclosure is required by law or mandated by a court of law.

## B. Incurring Costs

All costs incurred in preparing the proposal, or costs incurred in any other manner by the respondent in responding to this RFP will be wholly the responsibility of the respondent. All materials, supporting materials, correspondence and documents submitted in response to this RFP will become the property of Cornerstone Community Action Agency and will not be returned.

## C. Negotiations

Cornerstone Community Action Agency reserves the right to negotiate the terms and conditions of the contract with any of the evaluated proposers. Should the successful proposer and Cornerstone Community Action Agency fail to come to an agreement, Cornerstone Community Action Agency may, at its sole discretion, award services to any of the remaining proposers. The proposer to whom the contract is awarded shall be required to enter into a written contract with Cornerstone Community Action Agency. This RFP and the proposal, or any part thereof, shall be incorporated into and made a part of the final contract.

## D. Hold Harmless Agreement

Proposer agrees to protect, defend, indemnify and hold harmless Cornerstone Community Action Agency and its Directors, employees, and agents from any and all costs, claims, and damages of every kind and nature made, including attorney’s fees rendered or incurred by or in behalf of every person or corporation whatsoever, including the parties hereto and their employees that may arise, occur, or grow out of any acts, actions, work or other activity done by the proposer, its employees, subcontractors, or any independent contractor working under the direction of either the proposer or subcontract in the performance of this contract.

## E. Guarantee

Proposer certifies by proposing, that he or she is fully aware of the conditions of service and purpose for which services included in this RFP are to be purchased, and that his or her offering will meet the requirements of service and purpose of Cornerstone Community Action Agency and its agent.

## F. Small and/or Minority-Owned Businesses

Efforts will be made by Cornerstone Community Action Agency to utilize the services of small businesses and minority-owned businesses.

## G. Non-Discrimination and Equal Opportunity

No person shall, on the grounds of race, gender, color, religion, national origin, sex, ancestry, creed, age, medical condition, disability, genetic information, veteran status, citizenship status, marital status, sexual preference, or any other basis recognized by state, federal or local law, be excluded from participation in, be denied the benefits of, be subjected to discrimination under, or be denied employment in the administration of, or in connection with, any program or activity funded in whole or in part, with funds made available under this contract.

V. Attachment A

## A. Minimum Standards to Include in Proposal

The following criteria will be used for evaluating each proposal:

1. Overall product quality;
2. Suitability of the software to meet required data collection and reporting needs of the agency and its mission;
3. Cost;
4. Customer Service and Support.

## B. Submission Requirements

Responses to the bid solicitation must contain the following information:

1. Description of how the software allows Cornerstone Community Action Agency to collect client data to meet eligibility and reporting requirements according to the Texas Department of Housing and Community Affairs guidelines and assurances that software is updated based on all federal and state regulation changes in a timely manner.
2. Description or example of how product meets the following software specifications:
   1. Internet Based
   2. Licenses Available for up to 30 users
   3. Reporting system to meet Texas Department of Housing and community affairs requirements for CSBG, CEAP
   4. Ability to add addition programs under CEAP/CSBG when additional funds become available.
   5. Pricing must include technical support and upgrades.
   6. Case management section to include case notes and track client progress with specified date range.
   7. National Performance Indicator collection and reports
   8. Must attach sample voucher/notice of payment
   9. Ability to create and print reports by LIHEAP component or collectively.
   10. Transfer data from current client tracking software
   11. Ability to create ad hoc reports and export report data to Excel
   12. Online portal available to clients to submit applications for assistance and integration of online applications with the main client database
   13. Ability to track fund expenditures of various programs
   14. Scanning & uploading documents
   15. Track Family based National Performance Indicators (FNPIs) and Community Based National Performance Indicators (CNPIs)
   16. Generate CEAP & CSBG reports for any date range without having to run individual queries for all line items by county or collectively.
   17. Generate Outcome (NPI) reports and reports on client enrollment.
   18. Ability to upload digital files for CSBG and CEAP reporting as per specifications by TDHCA.
   19. Ability to export payment voucher to CSV file.
   20. Online portal where applicant can make application for assistance. Database should stream into backend database without any user intervention
   21. Family Self Sufficiency Survey and ability to build other assessments.
   22. Track fund expenditures.
3. Pricing – This contract would be for one year, with an option to renew for an additional four years. First contract will begin when selection is finalized and following years will be effective January 1st. Please indicate pricing in the format of the example below.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
| Software Cost |  |  |  |  |  |
| Licensing Fees |  |  |  |  |  |
| Annual  Maintenance Cost |  |  |  |  |  |
| Other Cost: Specify |  |  |  |  |  |
| Discounts |  |  |  |  |  |
| Total |  |  |  |  |  |

1. List/discuss any value added services that you will provide and include the value associated with the service.

I. Attachment B

## A. Evaluation Criteria/Rubric

|  |  |  |  |
| --- | --- | --- | --- |
| Items | Response | Possible Points | Points Received |
| Complete Packet |  | 0-5 |  |
| Prior Non-Profit  Experience |  | 0-10 |  |
| Knowledge of federally funded  utility assistance programs, weatherization assistance programs, National performance indicators and transitioning out of  poverty and reporting requirement for state of Texas |  | 0-15 |  |
| References |  | 0-15 |  |
| Total 5-year Cost |  | 0-35 |  |
| Value Added  Services |  | 0-20 |  |
| Total |  | 100 Maximum Points |  |