

**MISSOURI OFFICE OF REFUGEE ADMINISTRATION (MO-ORA)  
REQUEST FOR PROPOSAL**

**AMENDED 1/24/2019: AREAS AMENDED HIGHLIGHTED IN YELLOW**

Note: only amended dates of demonstrations of vendors on Page 2 and Request to Demonstrate Product form, Attachment A

**Notice is hereby given by the Missouri Office of Refugee Administration (MO-ORA) that request for proposals are being accepted for a state-wide web-based client management software system. Interested parties are hereby invited to present, either in-person or on-line, their system at a set time to be scheduled on one of two dates, February 19 or 20, 2019.**

**RFP Release Date:** January 14, 2019

**RFP Response Due** 4:00 p.m. CST, March 14, 2019

**Date:**

**Vendor** A business that has a proven history working with Refugee

**Qualifications:** Resettlement and is knowledgeable on the wide variety of programs refugee resettlement agencies administer, principles of case management/family development, community initiatives, and reporting requirements. The vendor must demonstrate through the proposal that the software system meets the specifications the Missouri Office of Refugee Administration seeks, as defined in this RFP. Additionally, vendors must meet all federal sub-contracting requirements.

## I. GENERAL INFORMATION

Missouri Office of Refugee Administration (MO-ORA) seeks to implement a state-wide web-based client management software system. The software will be used in a multiple program environment (individual, family, and community focus), and must enable Missouri's local refugee resettlement to meet agencies' reporting requirements for MO-ORA and the U.S. Department of Health & Human Services' Administration for Children & Families' Office of Refugee Resettlement (ORR) and all reporting requirements for common MO-ORA programs. It is important to note that we are seeking a statewide software solution that successfully supports individual agency business processes, in addition to meeting statewide reporting requirements.

All questions regarding this RFP should be submitted to via email to Paul Costigan at [costiganp@iistl.org](mailto:costiganp@iistl.org).

The evaluation process for this project will be conducted in two stages. Stage one will consist of a demonstration of basic system capabilities and evaluation of the capabilities by MO-ORA and local resettlement agency representatives. The top vendor(s) evaluated will move on to stage two, which consists of the following:

1. Total response to the following RFP by 4:00 p.m. CST, March 14, 2019.
2. Field evaluation (software must be made available to our up-to 15-member evaluation team across the state).

We anticipate that a final vendor will be selected after the stage two evaluation but reserve the right to select more or fewer than two vendors for stage two, depending on the initial scoring of the responses received. Detailed proposal submission instructions and timeline are below.

#### **REQUEST FOR PROPOSAL SUBMISSION INSTRUCTIONS**

The proposal is to be submitted as a pdf file, in a format that follows the outline and order of this RFP document. The name of the vendor should appear at the top of each page and all pages should be numbered consecutively. Additional pertinent information not specified in this RFP may be included but will not be accepted in lieu of any listed RFP requirements.

The completed proposal must be submitted via email attachment to Paul Costigan at [costiganp@iistl.org](mailto:costiganp@iistl.org), **no later than 4:00 pm CST on March 14, 2019**. A confirmation will be sent within 24 hours of receipt for each proposal.

#### **The scheduled RFP and evaluation process and estimated timeline is as follows:**

1. January 14, 2019 – Issue RFP
2. January 24, 2019 – Pre-bid conference call, starting at 10:00 am CST for vendor candidate questions & answers. Pre-Bid Conference telephone call-in: 978-964-0050, password 97042539#.
3. January 31, 2019 – Deadline for vendor to submit request to demonstrate product. Submit request to demonstrate to Paul Costigan at [costiganp@iistl.org](mailto:costiganp@iistl.org) utilizing Attachment A.
4. **February 21 and 22, 2019** – Demonstrations by vendor(s) of general product information (required areas to be included noted in RFP Content Section). Each vendor must limit their presentation time to no more than two hours, with an additional allotment of 30 minutes for questions and answers.
5. March 14, 2019 – RFP proposals to be submitted by 4:00 p.m. CST.

6. March 29, 2019 – RFP proposals reviewed for compliance with requirements. Those meeting the minimum requirements described in section II will be informed of their acceptance for the field evaluation process and be given a start date for field users to perform live/online demonstrations of the product(s) usability.
7. Field evaluation process start dates with live/online testing (order randomly assigned)
  - a. April 15, 2019 evaluation; software site available to Missouri team through April 22.
  - b. April 29, 2019 evaluation; software site available to Missouri team through May 6.
8. May 21, 2019 – Missouri evaluation team will have reviewed and scored overall vendor performance.
9. May 30, 2019 – Final vendor selection and announcement

## **II. EVALUATION AND ANNOUNCEMENT OF PROPOSAL ACCEPTANCE**

### **A. EVALUATION CRITERIA**

The following items are required for a proposal to be considered:

1. A company that has an established record of successfully providing software services and products to private 501(c)3 organizations, with preference given for work with refugee resettlement agencies, and additional preference given for a successful record of at least three years;
2. A company that meets all federal sub-contracting requirements
3. Ability to meet the project timeline on the preceding page (as described in Section III, item D. 4. below)

Proposals meeting the above criteria will be screened to determine that minimum requirements have been met. Minimum requirements consist of having met all items in section III B, and having met or exceeded 90% of the items in Section III C below. Proposals meeting those criteria will be forwarded to a software review committee for evaluation. Additional information may be requested of any vendor during the evaluation process.

MO-ORA reserves the right to award to the bidder that presents the best value as determined solely by MO-ORA in their absolute discretion. The purchase of any services by MO-ORA is contingent upon MO-ORA and the selected vendor entering into a mutually agreed upon

contract or contracts approved by MO-ORA. The contract that is executed as a result of this RFP must bind itself to amendment by mutual consent of MO-ORA and the selected vendor.

### III. PROPOSAL CONTENT

A complete proposal will contain, in order and clearly identified, the components listed below. The components noted with a <sup>1</sup>, *italicized & underlined* should be included in the in-person/online demonstration scheduled in February 2019.

- A. PROPOSAL COVER SHEET** – must include Attachment B as cover sheet for your proposal.
- B. COMPANY INFORMATION:** Please provide information about the company, its Refugee Resettlement experience and how it develops/maintains the proposed database system.
1. **Organizational Chart** – Provide an organizational chart listing all company employees and contractors. Please highlight those individual positions that would be directly involved with the Missouri Office of Refugee Administration (MO-ORA), their titles and brief position descriptions.
  2. **Refugee Resettlement Experience** – Provide a history of the company’s involvement with Refugee Resettlement Agencies (local as well as state-wide), emphasizing the activities relevant to this Request for Proposal. Additionally, provide contact information for at least two organizational customers that use the company’s product, with preference given to Refugee Resettlement Agencies, particularly ones that have implemented the database statewide and use the system for multiple agency programs and multiple funding sources.
  3. **System Development/Revision Process** – Provide a detailed account of the company’s software development/revision process, including which duties, if any, are sub-contracted. <sup>1</sup> *Also include information about how the company maintains the system to meet the reporting requirements for common Refugee Resettlement national funding sources, how and when customers are notified about system changes and how saved data is protected when software updates occur.*
  4. <sup>1</sup> *Project Management - Describe your company's approach to project management during all stages of the proposed project: requirements gathering, software development & testing, documentation, training & implementation, and ongoing support; include measures to ensure consensus and agreed-upon success.*
  5. **Training and Technical Assistance (T/TA)** – Describe the company’s implementation and on-going training and technical assistance process, including training and technical documentation, problem resolution methodology, and Help Desk/Support contact information.

**C. SYSTEM FUNCTIONALITY/FEATURES:** Please provide information about how the company's database system specifically meets the needs of the MO-ORA Network, including but not limited to:

1. Describe system features that promote intuitive user-friendly data entry and workflow processes.
2. Describe your company's approach to capturing required data elements for various program and funder requirements. Also describe ease of adding/changing parameters and data elements as needed (i.e. additional items in drop-down menus, changes to demographic data and/or other formatting).
3. Describe your process for uploading/storing documentation needed as part of a program or project (i.e., scanned images, other documents, for client, program, funder, or agency/standards, etc.).
4. Error Checking and Prevention Features - Describe system features that allow a local refugee resettlement agency to identify what data fields are being mined for reports and to check data entry for accuracy. Also describe the built-in features that help prevent data entry errors, omissions and duplications (data validation and quality assurance).
5. Describe how your software processes transactions, including handling data errors, timeout errors, or other potential transaction failures.
6. Describe how your software allows for client mobility between different agencies (i.e.: transferring an individual/family from one agency's domain to another).
7. Multiple Program Environment - Describe how Missouri's local resettlement agencies can use the software system for multiple programs, including but not limited to (\* marks required programs):
  - A. <sup>1</sup> \*Case Management/Family Support
  - B. <sup>1</sup> \*Refugee Cash Assistance (RCA) program enrollment, process tracking and reporting
  - C. \*Refugee Medical Assistance (RMA) initial enrollment date
  - D. \*Refugee Health Screening initial enrollment date
  - E. \*Refugee Support Services (RSS) enrollment
  - F. \*Services to Older Refugees (SOR) program enrollment
  - G. \*Refugee School Impact (RSI) program enrollment
  - H. \*Youth Mentoring Program Enrollment
  - I. \*English Language Learning (ELL) Classes/Sessions
  - J. \*Direct client services (food, clothing, transportation vouchers, etc.)
  - K. \*Agency-specific programs as needed
  - L. RCA payment processing

- M. Case Note aggregation
- N. Volunteer participation
- O. In-kind donation recording

8. *<sup>1</sup>Case Management/Family-Development – Describe how the database system incorporates case management/family development principles and how the intake, assessment, referrals, planning, services, and goal tracking steps (including evaluation scales from crisis to thriving) are tied together.*
9. *<sup>1</sup>Non-Case Management/Family Development Consumers – Describe how individual/stand-alone services for non-case management customers are entered, such as referrals and ELL classes. Also address the system’s capabilities to bulk enter multiple customers and services received (i.e., large volume data entry from offline events).*
10. Please describe how the company can assist local resettlement agencies create a single data repository when multiple consumer databases are in use.
11. *<sup>1</sup>Describe how your software helps local resettlement agencies capture, report and utilize their data for reporting requirements and ongoing process improvement (see National Report requirements below) including future updates to the national ORR-6.*
12. *<sup>1</sup>National Report Requirements - Describe how the company’s software system enables local resettlement agencies to meet Office of Refugee Resettlement (ORR) national reporting requirements for common Office of Refugee Resettlement programs. Also describe how local resettlement agencies can add non-database numbers to create agency-wide reports. Include a list/sample of “canned” reports.* Most ORR national reports can be found at <https://www.acf.hhs.gov/orr/resource/report-forms> and include the following:
  - A. ORR-6 Performance Report (excluding FFY2018 Schedule A Sections 1-3 and 6-10, Schedule B Section II, Schedule D and Schedule D Narrative) – may be revised by ORR during FFY 2019 – see zip file for current and future versions.
  - B. ORR-6 Annual Service Plan – may be revised by ORR for end-of-year reporting for FFY2019– see zip file for current and future versions.
  - C. Annual Outcome Goal Plan, Excel document only, available at <https://www.acf.hhs.gov/orr/resource/report-forms>.
  - D. ORR-5 Expanded Data submission, information available at <https://www.acf.hhs.gov/orr/resource/state-arrival-and-service-data-collection-process-for-fiscal-year-2018> , with additional information available in zip file.
13. Describe how your canned reports, custom reports, and ad hoc reports design process and database mapping will be shared with MO-ORA.

14. Ad-Hoc and Export Features – Describe the software system’s ad-hoc reporting and data exporting features (scheduled and on-demand exporting). Address the ability for users, including non-database experts, to easily drill down within reports to identify detailed records that comprise aggregate totals (based on agency user permissions).
15. Describe how non-identifying, real-time, agency-specific and statewide aggregate consumer demographic and outcome information can be obtained by MO-ORA.
16. Web-Based System Hosting - Describe how the system is accessed via the Internet, what hosting infrastructure is used, what level of redundancy exists, how and when data is backed-up, what features are used to secure confidential data and what systems are in place to ensure fast, reliable access to the system from both rural and urban locations, including disaster preparedness plans and recovery processes. Additionally, please describe the minimal requirements needed for a computer to access the system with reasonable efficiency.
17. Security and Confidentiality - Describe the physical and cyber security features overall and specifically as they are used to secure confidential data during transmission and storage, including how your software meets/exceeds HIPAA standards.
18. Statewide Deployment and Application – Describe how the software system could be deployed in Missouri. Describe how the database could effectively accommodate each of the six entities (five local refugee resettlement agencies and MO-ORA) having a specific area/database that can be customized to individual agency needs, and also have them linked with each other to allow consumer data to be shared. Specify the user and administrator roles within your software that would facilitate local user, local administration, and statewide system administration.
19. Agency-Specific Customizations – Describe system features that can be customized at the agency level. Additionally, describe how a state-wide implementation of the database would impact the ability of agencies to customize their own areas.
20. Additional features (not scored as part of minimum requirements):
  - a. Referral verification/update with external agencies based on email transactions.
  - b. Printable notices to clients
  - c. Scannable intake forms.
  - d. Electronic client/community interaction log (track phone calls/walk-ins, etc.)
  - e. Mobile device accessibility
  - f. Web portal (client login capability)
  - g. Describe your process for ongoing imports from other systems, if applicable.
  - h. Describe the system capabilities to interface in real-time with existing systems, if applicable.

- i. Describe your process for data migration/conversion from existing software platform as part of the software development/implementation process, if applicable.

**D. SYSTEM COSTS and TIMELINE:** Describe all costs associated with the company's system, and project timeline. ***Please include a break/separation at the beginning of this section of your response.***

1. Initial Implementation/Deployment Costs - Describe all initial costs associated with the implementation/deployment of the company's database system, including the purchase, set-up, fees associated with concurrent user licenses (if applicable), and training costs.
2. Annual Maintenance and Hosting Costs - Describe all on-going costs associated with the annual maintenance and hosting of the company's database system.
3. Other Costs - Describe other costs that may be associated with the company's database system, including any required items that may be considered customizations, creating new standard reports, etc.
4. Development/Implementation timeline - Describe the estimated time frame for software development and testing, implementation, and training for your software to meet the needs outlined in this RFP. The following should include but not necessarily be limited to the following steps:
  - a. Begin requirements gathering and software development
  - b. Vendor demonstration of initial working offering
  - c. Begin final acceptance testing
  - d. Final Acceptance Testing completed
  - e. Pilot process and evaluation; training documentation started
  - f. Final development
  - g. User training
  - h. Rollout in two stages
  - i. Statewide use on the new system
5. Proposal Timeline – Define the time length the proposed costs are valid. Include any scheduled cost increases that may be applied to amendments or extensions of any initial contract award.
6. Contract Form/Sample – Include a sample contract, including any standard attachments or appendices, completed with estimates based on this RFP.



The following information can be used when determining costs:

- There are five local refugee resettlement agencies and one additional entity that could have over 30 combined user accounts. Concurrent users will range from 10 up to peaks of 20 or more.
- MO-ORA staff will need to have real-time query capabilities to obtain agency-specific and statewide demographic and outcomes information (non-customer identifying information).

#### **IV. RESERVATIONS**

MO-ORA reserves the right to award to the bidder that presents the best value as determined solely by MO-ORA in their absolute discretion.

This request for proposal does not constitute an offer or contract. Oral communications of MO-ORA officers and employees or agents of MO-ORA concerning the RFP will not be binding and will in no way excuse the vendor of their obligations as set forth in this RFP. MO-ORA reserves the right to withdraw or cancel this RFP at its sole discretion at any time in the process prior to a signed contract.

The contract that is executed as a result of this RFP must bind itself to amendment by mutual consent of MO-ORA and the selected vendor.

MO-ORA reserves the right, prior to awarding any contracts for this project, to reject any and all proposals and may resubmit this RFP for bid.

The purchase of any services by MO-ORA is contingent upon MO-ORA and the selected vendor entering into a mutually agreed upon contract or contracts approved by MO-ORA.

Further, the provisions of this Notice are intended to comply with the requirements of ORR and the Refugee Act. If any provisions of the Notice are inconsistent with any provision of the Act or Federal interpretations thereof, then such inconsistent provision(s) shall be construed and applied in a manner as to comply with the Act.

**Missouri Office of Refugee Administration Statewide Software Request for Proposal (RFP)  
Request to Demonstrate Product**

**Program/Software Title:** \_\_\_\_\_

**Name of Demonstration  
Vendor:** \_\_\_\_\_

**Vendor Address:** \_\_\_\_\_

**Vendor City/State/Zip:** \_\_\_\_\_

**Contact Individual for Matters  
Related to this  
Demonstration:** \_\_\_\_\_

**Contact's Phone Number:** \_\_\_\_\_

**Contact's E-Mail Address:** \_\_\_\_\_

**1<sup>st</sup> Choice Demo Time:**       Feb 21, 2019 at 12:15 p.m. CST       Feb 21, 2019 at 3:00 p.m. CST       Feb 22, 2019 at 8:30 a.m. CST

**2<sup>nd</sup> Choice Demo Time:**       Feb 21, 2019 at 12:15 p.m. CST       Feb 21, 2019 at 3:00 p.m. CST       Feb 22, 2019 at 8:30 a.m. CST

**\*On-line or In-Person  
Demonstration?** \_\_\_\_\_

**Any special  
requirements/supplies  
needed?** \_\_\_\_\_

\*For on-line presentations, vendor must provide means for up to 10 different users to access presentation.

To the best of our knowledge, the information contained within this proposal is correct and represents the company's desire to be the vendor of the Missouri Office of Refugee Administration's web-based consumer software system. The appropriate individual(s) has/have reviewed and approved this proposal, and the contact person assigned is authorized to enter into negotiations with the Missouri Office of Refugee Administration for the purpose(s) outlined in this Request for Proposal.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name and Title

\_\_\_\_\_  
Date

**Missouri Office of Refugee Administration Statewide Software Request for Proposal (RFP)  
Response Cover Sheet**

**Program/Software Title:** \_\_\_\_\_

**Name of Proposal Vendor:** \_\_\_\_\_

**Vendor Address:** \_\_\_\_\_

**Vendor City/State/Zip:** \_\_\_\_\_

**Contact Individual for Matters  
Related to this Proposal:** \_\_\_\_\_

**Contact's Phone Number:** \_\_\_\_\_

**Contact's E-Mail Address:** \_\_\_\_\_

To the best of our knowledge, the information contained within this proposal is correct and represents the company's desire to be the vendor of the Missouri Office of Refugee Administration's web-based consumer software system. The appropriate individual(s) has/have reviewed and approved this proposal, and the contact person assigned is authorized to enter into negotiations with the Missouri Office of Refugee Administration for the purpose(s) outlined in this Request for Proposal.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name and Title

\_\_\_\_\_  
Date