EASTERSEALS
Request for Proposal for Client Database System

Easter Seals Metropolitan Chicago (ESMC) invites proposals for Client Database System.

ESMC must receive proposals (5 hard copies to the address below and one electronic copy via email to cjackson@eastersealschicago.org) on or before 2pm on Wednesday, March 1, 2017, in a sealed envelope clearly marked "Client Database System Proposal" addressed to:

Chastity Jackson
Purchasing Agent
Easterseals
1939 West 13th Street
Chicago, IL 60608

ESMC reserves the right to reject any or all proposals or to waive any irregularities. No proposal may be withdrawn for a period of ninety (90) days after the date set for the opening of proposals.

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A. Purpose:

The purpose of soliciting proposals is to identify a provider for Client Database System for Easter Seals Metropolitan Chicago and its satellite sites for the next five years.

B. Proposal Guideline

1. Request for Proposal

This RFP, evaluation of responses, and the award of any resultant contract shall be made in conformance with current competitive selection procedures as they relate to the procurement of professional services by ESMC. A proposal shall be an irrevocable offer for ninety (90) days after the date set for the opening of proposals, until accepted or rejected.

2. Scope of Services

ESMC is soliciting proposals from Proposers who wish to provide a Client Database System to house student and client data to various facilities located within ESMC.

- Seeking to refine paper-based data systems in schools and adult programs.
- Need client information management system to house student and client data, streamlining the entry and maintenance of information while building out the regular reports that our Central Office requires.
- Looking to contract with expert provider who can give us technical assistance to get the program up and running across multiple locations, but also assist us in understanding additional tools that can support this work sustainably across multiple sites.
- Primary goal is to find the product best matched to the functionalities below, with attention to cost effectiveness.

SITES:

- 3 Schools- 300-350 active records at a given time
- 2 Adult Programs- 50 active records at a given time
- 1 Employment Program- Harry's Buttons- 50 active records
- 1 Camp program (active seasonally)- up to 50 records
- 1 Training Program- up to 300 active records at a time
- 1 Parent Program (TAP)- unknown number of active users at a time

USERS:

- Executive Team- up to 5 people
- Management Teams- up to 25 people
- Program Administrative Teams- up to 20 people

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ELEMENTS:

- Demographic information
- Student/Client contact information
- School District/Agency Contact Information
- Classroom and IEP/IPP Information and progress monitoring tool
- Attendance Data
- Transportation Information
- Enrollment Form Tracker
- Staff Lists by position and assignment
- Staff performance evaluations, staff coaching/support tracker
- Cloud based information sharing options
- School nutrition program management
- Ability to assign, change, and run rosters, reports, queries, etc.
- Alignment of data fields to ISBE, DHS, school district, and Admin Services measures
- Input Form for ease of master data entry
- Ability to update regularly
- Ability to list individuals as active/inactive and store and query historic information
- Need local use at each site, but ability for super users to have master access to all
- Ability to track issue resolution
- Cloud based information sharing options
- School nutrition program management
- Ability to customize to agency specifications

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3. Proposal Due Date

Proposals shall be submitted to:

Chastity Jackson
Purchasing Agent
Easter Seals Metropolitan Chicago, Inc.
1939 West 13th Street
Chicago, IL 60608

On or before 2:00 p.m. on Wednesday, March 1, 2017. Please submit 10 hard copies and 1 electronic copy of the proposal (via email to cjackson@eastersealschicago.org) and any additional information you desire to include.

4. Rejection of Proposals

Easter Seals Metropolitan Chicago reserves the right to reject any and all proposals, or any or all items of any proposal, or waive any irregularities of any proposal.

5. Award of Contract

No contract awarded under this proposal shall be assigned except with express written approval of the Board of Directors. Any attempted assignment in violation of this provision shall be voidable at the option of the Board of Directors.

6. Mandatory Documents

This RFP requires the mandatory completion of the following enclosed documents:

a. Proposal Form
b. Statement of Qualifications

7. Statement of Qualifications

Client Database System Vendors submitting proposals may furnish other information in addition to the required "Statement of Qualifications" form attached to this proposal. ESMC is interested in securing the services of a Client Database System vendor which has demonstrated a high level of service experience with multiple satellite sites. Selection will be made based on an evaluation of all information supplied, including the Statement of Qualifications, and not solely on the basis of lowest price.

8. Client Database System Operations

The operations environment for Client Database System includes:

- Installation
- Training
- Maintenance and upgrade
- Options for Client-based vs. Vendor-hosted/Cloud-based
    - If Hosted/Cloud based – Browser/OS requirements
    - If Client-based – Server specifications

Security/HR Specs:

- Software must allow for HIPAA compliance with proper security/firewalls

THE FOLLOWING QUESTIONS SHOULD BE ADDRESSED IN YOUR PROPOSAL:

- The standard offerings and pricing packages:
- Are there per user fees or per student fees?
- What are variables/add-ons that influence costs?
- Can product encompass the needs of various program types?
- Can your company provide the ability to support, train, and maintenance service?
- Back-up/Archiving options.
- Admin/Super-user capabilities/expectations.
- If Hosted/Cloud based - System availability (i.e. are there standard maintenance windows?)
- System upgrade frequency
- Help desk availability and cost
- Describe security methods of end-user data

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MONTHLY REPORTING AND INVOICING

- Automated monthly reporting of volumes.
- A monthly invoice with costs broken out for each location/program.

9. Analysis and Evaluation of Proposals

Proposals will be evaluated in accordance with the procedures contained in this section. During the evaluation, validation and selection process, ESMC may request answers to questions in writing. ESMC will select a short list of vendors for interview/presentation.

This section of the RFP describes the general procedures that will be utilized by ESMC during the evaluation and selection process. It is the intention of ESMC to select a vendor that is deemed to best satisfy the requirements of the RFP, taking into consideration all aspects of the RFP response, including experience, quality, and the cost of services.

a. Evaluation – ESMC staff will evaluate the proposals.

b. Cost factor – Cost will be a significant factor when all other evaluation criteria are relatively equal; however, relative experience with nonprofit and/or organizations with multiple locations is a major consideration.

c. Maintenance and Service— the contractor shall provide both remedial and preventative service for all units, and its cost should be included in the quoted monthly maintenance plan prices.

C. Proposal Form (Required)

Submitted herewith is our proposal to perform the Client Database System for various sites for the Easter Seals Metropolitan Chicago, Inc. (“ESMC”) and its subsidiary corporations for five years.

Having carefully examined the scope of services, requirements, and conditions affecting this Request for Proposal, the Proposer shall provide a Cost Proposal in which the Proposer will perform the services requested to include a detailed list of assumptions on which the Cost Proposal was based. Your proposal must identify any other pricing structures or cost. Please see example of Cost Proposal Sheet.

Firm's Name:

_____

Print Name: _____

Signature: _____

Title: _____

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D. <u>Statement of Qualifications</u>

Please describe, in detail, your plan for supporting this account, including, at a minimum, customer service capabilities, network support, on-site technical service and training availability. Please include whether the customer support assigned to this account are trained, whether or not they live in the Chicagoland area, and what your response time to service calls will be. Include the total number of customer support your company employs, and the number that would be dedicated to this account. What is the location of your primary customer support facility? Discuss any other aspect of quality assurance and customer support.

1. Name of Firm: _____

2. Address: _____

3. Telephone No.: _____

4. E-mail Address: _____

5. Fax No: _____

6. Information on the size and organizational structure of the firm.

7. Name of Partner or Manager who will have primary responsibility for the account.

8. Name of personnel, with their classification, who will be assigned to account.

9. Please provide a minimum of three references, including contact information, of nonprofit organizations that your Company has serviced within the last five years.

10. Additional comments regarding the vendor's qualifications.

Name: _____

Title: _____ Date: _____

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E. Other General Requirements

EQUAL EMPLOYMENT OPPORTUNITY

The bidder must be an Equal Opportunity Employer and comply with provisions stated in Section 12, "Equal Employment Opportunity" of the Agreement for Client Database System.

ERRORS AND OMISSIONS

If a bidder discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, they shall immediately notify the Agency of such error in writing and request clarification or modification of the document. Modifications will be made by addenda. Such clarification shall without divulging the sources of the request for same. Insofar as practicable, ESMC will give such notices to other interested parties, but ESMC shall not be responsible therefore.

If a bidder fails to notify ESMC prior to the date fixed for submission of bids of an error in the RFP known to them, or an error that reasonably should have been known to them, they shall bid at their own risk; and if they are awarded the contract, they shall not be entitled to additional compensation or time by reason of the error or its later correction.

The bidder should carefully examine the entire RFP and addenda thereto, and all related materials and data referenced in the RFP or otherwise available to them, and should become fully aware of the nature and location of the work, the quantities of the work and the conditions to be encountered in performing the work.

CONTACTS FOR INFORMATION

Bidders may email questions in writing to Chastity Jackson at cjackson@eastersealschicago.org Responses along with the questions will be emailed to all parties who have been furnished an RFP.

Oral communications concerning the RFP shall not be binding on ESMC and shall in no way excuse the bidder of their obligations as set forth in this RFP.

F. Agreement for Client Database System

BIDDER AGREEMENT

In compliance with this request for proposal, the bidder will propose and agree to furnish all labor, materials, transportation, and services for the work described and specifications and for the items listed herein.

A bid is subject to acceptance at any time within ninety (90) days after opening of it, unless otherwise stipulated. Bids cannot be corrected, altered, signed or withdrawn after the due date.

BID SIGNEE

If the bidder is an individual or an individual doing business under a firm name, the bids must, in addition to the firm name, be signed by the individual; if the bidder is a partnership, the bid must be signed with the partnership name by one of the partners; if a corporation, with the name of the corporation by an officer authorized to execute a bids on behalf of the corporation.

BIDDER'S UNDERSTANDING

It is understood and agreed that the bidder has, by careful examination, satisfied themselves as to the nature and location of the work, the character, quality and quantity of the materials to be encountered, the character of equipment and facilities needed preliminary to and during the execution of the work, and general and local conditions, and all other matters which can in any way affect the work under this contract. No verbal agreement or conversation with any officer, agent or employee of the Agency, either before or after the execution of this contract, shall affect or modify any of the terms or obligations herein contained.

INTENT OF SPECIFICATIONS

All work that may be called for in the specifications shall be executed and furnished by the successful bidder, and should any work or materials be required which is not denoted in the specifications, either directly or indirectly but which is nevertheless necessary for the execution of the contract, the bidder is to understand the same to be implied and required, and shall perform all such work and furnish any such materials as fully as if it were particularly delineated or described.

EXTRA WORK

No bill or claim for extra work or materials shall be allowed or paid unless such extra work or the furnishing of such extra materials has been authorized in writing by ESMC.

DISPOSITION OF PROPOSALS

All materials submitted in response to this RFP will become the property of ESMC, and will be returned only at ESMC's option and at the bidder's expense.

An original copy shall be retained for official files and will become a public record after the date and time for Final Bid submission as specified. However, confidential financial information submitted in support of the requirement will be returned upon request.

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