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2-1-1 Tampa Bay Cares, Inc.

**Next Generation 211 (NG 211)
Data & Technology Plan
Request for Proposal (RFP)**

2-1-1 Tampa Bay Cares, Inc.
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Schedule of RFP Events

| | |
|--------------------------------------|--|
| Issue RFP: | August 22, 2018 |
| Deadline to Submit Questions: | August 27, 2018 |
| Responses to Questions: | August 29, 2018 |
| Proposal Due Date: | September 28, 2018 12:00 pm EST |
| Finalist Interviews: | October 1 - 5, 2018 |
| Complete Initial Evaluation: | October 12, 2018 |
| Board of Directors Review: | October 17, 2018 |
| Decision Date: | October 18, 2018 |
| Project Start Date: | November 1, 2018 |
| Project End Date: | February 1, 2019 |
| Contact/Submit To: | Edward Perry Vice President of Programs and Services 211 Tampa Bay Cares, Inc. 5500 Rio Vista Dr Suite 5500 Clearwater, FL 33760 Phone: 727-480-6755 Fax: 727-213-6766 Email: edwardp@211tampabay.org |

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1 Statement of Work

1.1 Purpose

211 Tampa Bay Cares (211 TBC) is seeking proposals from consulting partners that will collaboratively work with 211 TBC Leadership to develop a next generation data and technology plan for our 211 contact center and 211 community asset database and online portal. The new 211 contact center data system should incorporate the Social Determinants of Health (SDOH) framework and Self-Sufficiency Outcomes Matrix into our contact center data collection and reporting. The 211 Community Asset database and online portal should incorporate the SDOH framework and AIRS Taxonomy of Human Services (<https://211taxonomy.org>). Applicants should have a strong background in Salesforce project management and architecture design. This project should start on November 1, 2018 and be completed by March 1, 2019.

1.2 Coverage & Participation

The intended coverage of this RFP, and any agreement resulting from this solicitation, shall be for the use of 211 TBC. We reserve the right not to enter into any contract, to add and/or delete elements, or to change any element of the coverage and participation at any time without prior notification and without any liability or obligation of any kind or amount.

1.3 Funds available

The scope this project is to develop a written plan with including budget. The maximum budget for this project is \$11,500.

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1.4 Project Deliverables

| Deliverable | Description | Deadline |
|---|---|-------------------|
| Sign contract. | Contract will include a Non-Disclosure Agreement to be signed to begin project. | November 1, 2018 |
| Initial Project meeting | Meet with 211 TBC Leadership to flush out project details. | November 6, 2018 |
| Research 211 TBC data and technology needs. | Meet with a survey staff about requirements for the new data and technology system. | November 20, 2018 |
| Review 211 TBC current systems and research new system designs. | Work with staff to provide an overview of the systems. | November 28, 2018 |
| Draft written project outline of recommendations and work plan. | All initial thoughts and designs should be submitted for review. | January 18, 2019 |
| Final written project outline and work plan with associated budget. | The Final thoughts and designs should be submitted with final budget included. | February 1, 2019 |

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2 General Information

2.1 Original RFP Document

211 TBC shall retain the RFP, and all related terms and conditions, exhibits and other attachments, in original form in an archival copy. Any modification of these, in the vendor's submission, is grounds for immediate disqualification.

2.2 The Organization

211 Tampa Bay Cares (211 TBC) is a private not-for-profit organization located in Pinellas County, FL. Our mission is to "create connections through the power of information, innovation, and hope". We achieve our mission through our programs: 2-1-1 Tampa Bay, Crisis Intervention Hotline Services, Help Me Grow Pinellas, and Healthy Transitions Pinellas.

211 Tampa Bay is a 24 hours a day seven day a week call center who answers more than 100,000 inquiries a year from people needing information and referrals to social service programs in Pinellas and Hernando Counties in Florida. 2-1-1 is the front door to the health and human services for many people. During times of disaster, 2-1-1 works closely with Emergency Management Officials to keep the community informed post disaster. 2-1-1 is included in the Pinellas County Emergency Operations Plan.

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3 Proposal Preparation Instructions

3.1 Vendor's Understanding of the RFP

In responding to this RFP, the vendor fully accepts the responsibility to understand the RFP in its entirety, and in detail, including making any inquiries to 211 TBC as necessary to gain such understanding. 211 TBC reserves the right to disqualify any vendor who demonstrates less than such understanding. Further, 211 TBC reserves the right to determine, at its sole discretion, whether the vendor has demonstrated such understanding. That right extends to cancellation of award if award has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to 211 TBC.

3.2 Good Faith Statement

All information provided by 211 TBC in this RFP is offered in good faith. Individual items are subject to change at any time. 211 TBC makes no certification that any item is without error. 211 TBC is not responsible or liable for any use of the information or for any claims asserted therefrom.

3.3 Communication

Verbal communication shall not be effective unless formally confirmed in writing by a specified procurement official in charge of managing this RFP process. In no case shall verbal communication govern over written communication.

3.3.1 Vendors' Inquiries.

Applicable terms and conditions herein shall govern communications and inquiries between 211 Tampa Bay Cares and vendors as they relate to this RFP. Inquiries, questions, and requests for clarification related to this RFP are to be directed in writing to:

Edward Perry
Phone: 727-480-6755
Fax: 727-213-6766
Email:
edwardp@211tampabay.org

211 Tampa Bay Cares, Inc.
5500 Rio Vista Dr
Suite 5500
Clearwater, FL 33760

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3.3.2 Informal Communications.

Informal communications shall include, but are not limited to: requests from/to vendors or vendors' representatives in any kind of capacity, to/from any 211 Tampa Bay Cares employee or representative of any kind or capacity with the exception of Contact Name for information, comments, speculation, etc. Inquiries for clarifications and information that will not require addenda may be submitted verbally to the named above at any time.

3.3.3 Formal Communications.

Formal communications shall include, but are not limited to:

- Questions concerning this RFP must be submitted in writing and be received prior to 5:00 pm EST on August 13, 2018.
- Errors and omissions in this RFP and enhancements. Vendors shall recommend to 211 Tampa Bay Cares any discrepancies, errors, or omissions that may exist within this RFP. With respect to this RFP, vendors shall recommend to 211 TBC any enhancements, which might be in 211 TBC best interests. These must be submitted in writing and be received prior to 5:00 pm EST on August 21, 2018.
- Inquiries about technical interpretations must be submitted in writing and be received prior to 5:00 pm EST on August 21, 2018. Inquiries for clarifications/information that will not require addenda may be submitted verbally to the buyer named above at any time during this process.
- Verbal and/or written presentations and pre-award negotiations under this RFP.
- Addenda to this RFP.

3.3.4 Addenda.

211 TBC will make a good-faith effort to provide a written response to each question on August 21, 2013. Questions will be answered in writing and sent to all parties who have formally submitted a question. The responses will also be published to our website along with the RFP at <http://211tampabay.org/request-for-proposals/>

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3.4 Proposal Submission

Vendors should submit the Vendor Application (Section 9 A1-3), narrative responses (Section 5 - 7), and any attachments required (Section 8). Vendors are to submit 5 copies and one original marked "Original" and 5 copies marked "Copy". Each original and copy must be individually bound.

211 TBC shall not accept proposals received by fax or email. Proposals must be delivered sealed on or prior to August 31, 2018 at Noon EST to the address below.

Edward Perry
211 Tampa Bay Cares, Inc.
NG 211 RFP Response
5500 Rio Vista Dr, Suite 5500
Clearwater, FL 33760

3.5 Method of Award

The evaluation of each response to this RFP will be based on its demonstrated competence, compliance, format, and organization. The purpose of this RFP is to identify those vendors that have the interest, capability, and financial strength to provide critical services 211 TBC. Below is the evaluation criteria used to selected a vendor:

1. **Experience & Proposal:** Evaluation of the vendor experience with Salesforce and the Social Determinants of Health Framework.
2. **Communication:** Vendors communication with customers.
3. **Business Partnerships:** Expressed interest in working with 211 TBC and ability of vendor to communicate its vision and capacity for establishing a relationship that addresses current and future needs and trends in the industry.

3.6 Selection and Notification

Vendors determined by 211 TBC to possess the capacity to compete for this contract will be selected to move forward in the process which may include an interview phase of this process. Written email notification will be sent to all vendors who apply detailing the decision made by 211 TBC. Those vendors not selected for the negotiation phase will not be notified until the final selection has been made

4 Vendor Application

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See Application in Section 9.

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5 Experience & Proposal

211 TBC has a total budget of \$11,500 for this project. In a written narrative, please detailed answers to the following questions:

- 5.1. Please provide a brief history of your company.
- 5.2. What is the vendor's experience project managing customized Salesforce solutions for nonprofits?
- 5.3. What is the vendor's experience designing and architecting customized Salesforce solutions for nonprofits?
- 5.4. What is the vendor's experience working with Salesforce Lightning?
- 5.5. For a project of this scope, how many of your staff would assigned to this project and what are their roles?
- 5.6. Please describe your working knowledge of the Social Determinants of Health (SDOH) framework and previous history implementing SDOH projects.
- 5.7. Please describe your working knowledge of the Self-Sufficiency Outcomes Matrix (SSOM) and previous history implementing SSOM projects.
- 5.8. For the amount requested above, what is the number of hours to be provided for the total request?
- 5.9. What is your hourly rate for this project? Does this include your nonprofit rate?
- 5.10 How many staff will be assigned to this project? What are their names and roles?
- 5.11 What is the expected payment schedule for this project?

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6 Communication

In a written narrative, please detailed answers to the following questions:

6.1. How often do you communicate with your customers on a project?

6.2. What is your service guarantee?

6.3. How do you resolve client complaints of poor service?

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7 Business Partnerships

In a written narrative, please detailed answers to the following questions:

7.1. Please list and describe similar Salesforce projects that had a Social Determinants of Health framework component? If none, please list an projects or partnerships focused on the Social Determinants of Health framework.

7.2. What sponsorship opportunities does your company participate in?

7.2. Please list your philanthropic focus areas?

7.3. Please provide a list of charities your company currently supports.

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8 Attachments

Please include a copy of your last audited financials.

Please submit a list of all non-profit organization customers.

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9 Application

Please provide each form below in your application.

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A1 Vendor Application

| | |
|--------------------------------|--|
| Organization Name | |
| Legal Business Name | |
| Address | |
| City, State, Zip Code | |
| | |
| Name of Business Owner | |
| Contact Name | |
| Contact Title | |
| Contact Person's Phone Number | |
| Contact Person's Email Address | |
| | |
| Name of Project Manager | |
| Number of Architect Lead | |
| Operating Budget | |

Signature of Authorized Officer:

| | | | |
|------------|--|--------|--|
| Name: | | Title: | |
| Signature: | | Date: | |

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A2 Vendor Certification

This certification attests to the vendor’s awareness and agreement to the content of this RFP and all accompanying calendar schedules and provisions contained herein.

The vendor must ensure that the following certificate is duly completed and correctly executed by an authorized officer of your company.

This proposal is submitted in response to Request for Proposal issued by 211 Tampa Bay Cares. The undersigned is a duly authorized officer, hereby certifies that:

| |
|--|
| |
|--|

(Vendor Name)

agrees to be bound by the content of this proposal and agrees to comply with the terms, conditions, and provisions of the referenced RFP and any addenda thereto in the event of an award. Exceptions are to be noted as stated in the RFP. The proposal shall remain in effect for a period of Insert Number of Days (#) Here calendar days as of the Due Date of the RFP.

The undersigned further certify that their firm (check one):

IS

IS NOT

currently debarred, suspended, or proposed for debarment by any federal entity. The undersigned agree to notify Company Name of any change in this status, should one occur, until such time as an award has been made under this procurement action.

Person(s) authorized to negotiate on behalf of this firm for the purposes of this RFP are:

| | | | |
|------------|--|--------|--|
| Name: | | Title: | |
| Signature: | | Date: | |
| Name: | | Title: | |
| Signature: | | Date: | |

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A3 Vendor Expertise

This certification attests to the vendor’s expertise to the content of this RFP. This proposal is submitted in response to Request for Proposal issued by 211 Tampa Bay Cares. The undersigned is a duly authorized officer, hereby certifies that:

(Vendor Name)

agrees they have the expertise outlined in the content of this proposal and expertise addresses the following areas

The undersigned further certify that their firm (check one):

- Previously and successfully completed a customized data project for a NonProfit
- Previously and successfully completed a project for a 211 Center or other N11 business.
- Is a Certified Salesforce Partner
- Previously and successfully completed a Social Determinants of Health (SDOH) Framework project
- Previously and successfully completed on a Self-Sufficiency Outcomes Matrix
- Other relevant Projects of note:

Person(s) authorized to negotiate on behalf of this firm for the purposes of this RFP are:

| | | | |
|------------|--|--------|--|
| Name: | | Title: | |
| Signature: | | Date: | |
| Name: | | Title: | |

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| | | | |
|------------|--|-------|--|
| Signature: | | Date: | |
|------------|--|-------|--|

A4 NonProfit Only Vendor References

| | |
|--|--|
| Reference 1 | |
| Organization Name | |
| Industry | |
| Contact Name and Title | |
| Phone Number | |
| Email Address | |
| Number of users | |
| Product name and version number | |
| Installation timeframe | |
| Go-Live date | |
| Number of client business staff involved | |
| Number of client IT staff involved | |
| Number of supplier staff | |

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| | |
|--|--|
| Reference 2 | |
| Organization Name | |
| Industry | |
| Contact Name and Title | |
| Phone Number | |
| Email Address | |
| Number of users | |
| Product name and version number | |
| Installation timeframe | |
| Go-Live date | |
| Number of client business staff involved | |
| Number of client IT staff involved | |
| Number of supplier staff | |

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| | |
|--|--|
| Reference 3 | |
| Organization Name | |
| Industry | |
| Contact Name and Title | |
| Phone Number | |
| Email Address | |
| Number of users | |
| Product name and version number | |
| Installation timeframe | |
| Go-Live date | |
| Number of client business staff involved | |
| Number of client IT staff involved | |
| Number of supplier staff | |