

**Request for Proposals for
Database & Data Reporting Programming Service Provider (RFP No.
ClientTracking-2024)**

Alliance of Community Assistance Ministries, Inc. (ACAM) seeks professional programming services from a service provider proficient and highly skilled in the Apricot™ client case management program. Accordingly, ACAM hereby solicits proposals from qualified organizations.

RFP TIMELINE

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| Official Release Date: Friday, March 1, 2024 Full RFP posted at: https://acamweb.org/funding-vendor-opportunities/ |
| Optional RFP Conference Friday, March 15, 2024 at 1:00 PM CST Registration required https://us02web.zoom.us/meeting/register/tZMtdemrjsjHtb7qHZiEvgqEQEX96Zu7utK |
| RFP Questions Due by Wednesday, March 20, 2024 at 12PM CST Please submit questions in writing to admin@acamweb.org with the subject line “RFP No. ClientTracking-2024 Questions_Agency Name” |
| Answers to Written Question Posted Friday, March 22, 2024, by 5:00 PM CST |
| Proposals Due: Monday, April 1, 2024 by 12:00 PM CST |
| Anticipated Preliminary Award Announcements: Monday, April 15, 2024 |
| Addenda and answers to questions will be posted at https://acamweb.org/funding-vendor-opportunities/ |

Responses to this RFP should be emailed to
Sarah Malcolm, Director of Resiliency Programs
admin@acamweb.org.

The proposal cover sheet must be signed and dated by an authorized representative of the proposing firm.

Late proposals will NOT be accepted. Proposals must be received via email by the due date. If all or any portion of a response submitted is received late or is otherwise non-responsive due to equipment failure or operator error, the response or the applicable portion of the response will not be considered. In addition, ACAM is not liable for equipment failure or operator error.

Alliance of Community Assistance Ministries, Inc. (“ACAM”) hereby requests proposals from a qualified consultants (herein “Contractor”) to perform programming services for a for a eight-month period (May through December) with the potential of being extended up to four additional years. Contracts may be renewed for subsequent time periods by mutual written agreement not to exceed four (4) renewal years running on ACAM’s fiscal year of January 1 through December 31. In addition, contractors may be selected to serve under multiple, concurrent, and/or intersecting projects based on the availability of funding. The one-year period begins May 1, 2024. Contractor will assist **ACAM** and its contracted service providers in ongoing set up and reports creation expected to mostly utilize of Apricot™ client case management system. ACAM is a management support organization (MSO) that assists nonprofit organizations through high-impact collaboration, technical assistance and organizational development. ACAM is located in Harris County, Texas and is active throughout Harris, Fort Bend, Montgomery, Galveston and Brazoria counties.

I. General

ACAM is a 501(c)(3) nonprofit management support organization (MSO) with the mission to “advance collaboration to create community-wide solutions for thriving nonprofits, neighborhoods, and families.” ACAM assists nonprofit organizations through high-impact collaboration, technical assistance, and organizational development. ACAM has a challenging role with responsibilities to two sets of clients: the nonprofits to which ACAM provides capacity building assistance; and the funding community, which expects measurable results from its investment in these programs. ACAM is soliciting proposals from qualified consultants to provide professional database modification, form and report template creation, beta testing, error and dashboard creating for ACAM’s various collaborative initiatives and projects. **The deadline for receiving responses to this request is Monday, April 1, 2024 by 12:00 pm CST.** Late proposals will not be accepted. Respondents must submit proposals by e-mail to Sarah Malcolm at admin@acamweb.org.

Proposals must be composed and assembled as outlined in section **IV. Content of Submission.** An optional RFP conference will be held virtually on Friday, March 15, 2024 at 1:00 pm. Registration is required at <https://us02web.zoom.us/meeting/register/tZMtdeMrrjsjHtb7qHZiEvgqEQEX96Zu7utK>. ACAM will not provide assistance to any respondent in the preparation of a proposal, but will, however, entertain questions submitted in writing through **Wednesday, March 20, 2024 at 12:00 PM CST.** Please direct questions to Sarah Malcolm at admin@acamweb.org Questions will not be accepted thereafter.

II. Background Information

Founded in 2004, ACAM is a 501(c)3 nonprofit management support organization (MSO) that assists a network of community assistance organizations (the ACAM Network) with improving their organizational and program effectiveness. ACAM has a challenging role with responsibilities to two sets of clients: the nonprofits to which ACAM provides organization development assistance and the funding community, which expects measurable results from their investment in these programs.

Mission: The ACAM Network advances collaboration to create community-wide solutions for thriving nonprofits, neighborhoods, and families.

Vision: An innovative, connected network that ensures families in need have a path to stability, health, and wealth.

Funding Sources - In the past two years, ACAM's primary funding sources include, but are not limited to:

- Bank of America
- Community Health Choice
- The George Foundation
- Houston Immigration Legal Services Collaborative (HILSC)
- The Susan and Michael Dell Foundation
- Texas Department of Housing & Community Affairs (TDHCA)
- The Powell Foundation
- The Aspen Institute
- Trellis Foundation
- United Way of Greater Houston
- Wells Fargo
- William Stamps Farish Fund

Current Programs & Activities - ACAM's primary programs/activities and roles are:

- **Organizational & Network Development:** ACAM promotes sound practices in nonprofit operations and programming. Organizational assessments inform Network Partners on areas of strength and weakness and are used to develop capacity building plans. ACAM supports plan implementation through stipends for training, consulting, and direct grants to develop organizational infrastructure.
- **Training and Networking:** ACAM promotes best practice knowledge, peer learning and information exchange for the following groups: executive leaders, resource development managers, volunteer coordinators, client service managers and thrift store managers. Peer mentoring relationships are developed among executive leaders. This component also helps to build relationships between ACAM and funders.
- **Community Outreach & Education:** ACAM staff reaches out to underserved parts of Greater Houston to raise profile of the ACAM network as service hubs in their communities and promote the issues affecting the people served by the Network.
- **Collaborative Initiatives:** ACAM helps the 16-partner ACAM Network use its collective strength to develop region-wide service streams and service models that address root causes of poverty. ACAM also organizes Network- and funder-driven initiatives to provide immediate response to member needs.
- **Management Support Services:** ACAM offers expertise to organizations and networks outside of its Network. Some examples of available services under this program include:
 - Research and assessments.
 - Resource distribution and facilitation and convening partners and stakeholders
 - Technical assistance and targeted trainings

- Collaboration support to other networks
- **Organization Data** - ACAM’s current budget is approximately \$6 million. A seven-member Board of Directors charged with setting overall organizational policy governs ACAM. ACAM’s Chief Executive Officer (CEO) reports directly to the Board. ACAM currently has 15 full-time positions and an AmeriCorps VISTA. Together they are responsible for daily programmatic, fundraising, and administrative operations. ACAM disburses funding to selected organizations and as such, approximately 60-80% of ACAM’s budget is disbursed to partnering organizations in regular transactions. ACAM’s operating budget less awards to other organizations is typically less than \$2M per year with more than half of that expensed on payroll and consulting fees.

III. RFP Timeline

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| RFP Release Date | Friday, March 1, 2024 |
| Optional RFP Conference | Friday, March 15, 2024 at 1:00 PM CST |
| Deadline to submit questions in writing | Wednesday, March 20, 2024 at 12:00 PM CST |
| Answers to written questions posted | Friday, March 22, 2024 |
| Proposals Due | Monday, April 1, 2024 at 12:00 PM CST |
| Preliminary Award Notification | Monday, April 15, 2024 |
| Estimated Contract Term Year 1 Start | Wednesday, May 1, 2024 |

IV. Scope of Services

The purpose of the Request for Proposals is to obtain data and data reporting services for a portion of the current fiscal year beginning **May 1, 2024, through December 31, 2024. Any subsequent renewals of the contract will be on a calendar year to align with ACAM’s fiscal year.** The scope of services will consist of the following (most activity completed remotely):

- Develop forms in collaboration with partners to define, collect, and compile standardized outputs and outcomes that will be cross-functional within the client data tracking ecosystem
- Ensure integrity and consistency of forms inside contractor databases
- Assist with training ACAM and its contracted organizations on the proper utilization of forms for data tracking
- Create data tracking systems usage instructions, standard operating procedures
- Create reports inside client tracking systems that will be cross-functional within the client data tracking ecosystem
- Create standardized data quality and pull data quality reports to assist contractors with identification of errors to maximize efficiency and reduce errors
- Compile reports from contracted organizations into one report for ACAM’s use
- Create Dashboards to monitor data quality and demonstrate program success

- Participate in meetings to identify where there may be a lack of clarity or need for additional fields
- Assist ACAM in analyzing data for summary reporting purposes
- Manage and direct the project efficiently and respond to customer support requests

All records will be maintained by the proposer in accordance with ACAM's record retention policy and any relevant regulatory requirements but will remain the property of ACAM. Any and all records will be surrendered to ACAM upon request.

The proposer will not release records or information related to ACAM.

ACAM will provide the selected firm with necessary documentation and information to ensure the firm has all that it needs to successfully perform the duties outlined in this RFP.

ACAM is reviewing software options for sending and receiving more confidential documents requiring heightened security. Please note if your firm has a secure portal available to upload and download documents.

IV. Content of Submission

The following is a description of the minimum information which must be supplied by Contractors in their proposals. It is open to all Contractors to give such supplementary facts or materials that they may be considered in the evaluation of the proposal submitted. Proposals that omit critical elements may be considered non-responsive. Proposal narratives shall be completed in the attached RFP Response Form. Application packages must contain, at a minimum, the following information and materials:

Attachments

- Proposal cover sheet signed and dated by a Certifying Representative. This document shall be placed in front of the proposal.
- Narrative response shall be provided in the Response Form and follow the character limits set for each section.
- Certifications held, and résumés of the staff to be assigned to the program.
- Submit dated proof that applicant is not excluded from doing business on the federal level:
 - Select "Search Records" on the Federal System for Award Management ("SAM") website located at <https://sam.gov/content/home> (Note that this is a free service).
 - Select "Entity Information" click "All Entity Information" and toggle to "Exclusions". Type the name of the applicant followed by an asterisk (the "*" symbol) in the "Search Exclusions" bar.
 - If your search yields no matches found, this is sufficient for the debarment check and can be saved by printing to pdf.
- Submit dated proof that applicant is not on the State of Texas debarred vendor list by screenshotting or printing to .pdf from

<https://comptroller.texas.gov/purchasing/programs/vendor-performance-tracking/debarred-vendors.php>

- Demonstrate 'ACTIVE' tax account status using the Texas Comptroller Taxable Entity Search at <https://mycpa.cpa.state.tx.us/coa/search.do>
- Historically Underutilized Business (HUB) certification, if applicable. The respondent shall submit information indicating if the respondent firm is a Historically Underutilized Business (HUB).

RFP Response Form

1. Executive Summary

Provide a brief summary of the firm's approach to the work associated with the requested services demonstrating an understanding of the scope of work required and unique or innovative approaches to be utilized in performing these services.

2. Experience and Qualifications

- a. Describe how long the respondent firm has been in business under the present name and structure. Provide any other names under which the firm has done business and the dates it operated under each name and the locations at which it operated under each name (750 character maximum).
- b. Describe the respondent firm's experience in conducting comparable services, similar in scope to ACAM's requested services, during the most recent five-year period (1,250 characters maximum). ACAM and its partners have used Apricot™ in a variety of programs and projects including employment, housing stability, financial capacity building and financial coaching. In addition, Apricot™ has provided essential data for reporting to funders on the outcomes achieved by clients and organizations. A competent contractor will possess extensive programming experience in Apricot™ client case management software.
- c. Provide a list of nonprofit organizations to which your firm has provided similar services. Briefly describe the services provided and the similarities to the scope of work described in the RFP. (1,250 characters maximum) Proposers must provide 2 examples from current or past clients where the scope of work included discovery, new content building, custom reporting, and project management services.
- d. Provide a brief description of the qualifications and experience the firm has in the various categories described in the Scope of Work, Certifications held, and attached résumés of the staff assigned to do this work. Describe the qualifications of the staff who will be assigned to provide services to provide services to ACAM and why they are best suited to work with ACAM including expertise with relevant software (1,500 characters maximum).

3. Task/Activity Plan

Proposals should describe direct experience with Apricot™ including working with systems that others have created and modified. The respondent will state how they will carry out contract requirements in the event of an illness or other circumstance that may limit the Contractor's ability to complete the work requested in this RFP. The respondent will

state how they will carry out contract requirements in the event of an illness or other circumstance that may limit the Contractor's ability to complete the work requested in this RFP (1,250 character maximum). Proposals should describe direct experience with Apricot™ including working with systems that others have created and modified. If the respondent is a registered Historically Underutilized Business or a certified Woman-Owned Small Business, the respondent is welcome to describe this and provide appropriate documentation of registration or certification. Respondents should understand that ACAM operates as an alliance of separate social service organizations. Each organization owns their own Apricot™ account. In light of this fact, a successful contractor will have experience in relationship management, understanding related but varied needs represented by the participating organizations. A contractor who can work towards uniform data collection among agencies with separate but similar Apricot™ accounts would serve this alliance well. A successful contractor will have the ability to coordinate among different participants to achieve shared goals. In addition, a successful contractor will be able to respond to time-sensitive opportunities that the alliance pursues. Proposals should address these skills and capacities in detail.

4. Estimated Fees

Please state the proposed contract fee for providing services for ACAM in the chart. Any additional expenses, unless agreed upon by ACAM in writing, will be the sole responsibility of the firm above the set maximum agreed-upon fee.

The Contractor shall provide:

- 1) A cost per hour (hourly rate)
- 2) Any estimated in-kind or pro bono services
- 3) Net cost per hour (total cost less pro bono)

The proposal must include an hourly rate for services such as discovery, new content building, custom reporting and project management. ACAM will not use the lowest cost as the sole basis for selecting the best bid for this contract. Proposals should identify an hourly rate which is all-inclusive. Reimbursement for travel, mileage, supplies/materials or other incidentals will not be paid by ACAM and should not be included in this proposal.

The Contractor's fee will be considered in addition to other technical factors in determining the offer most advantageous to ACAM. Because ACAM has limited resources, innovative and creative fee arrangements proposed by the respondent that minimize risk and cost to ACAM will be considered favorably. Respondents shall provide complete information on any in-kind/pro bono services which may be provided in the course of providing services.

5. Other Relevant Information (optional)

Proposer may include any additional information for consideration (1,250 character maximum).

V. Basis of Proposal

The successful respondent(s) will be expected to execute a standard professional service contract with ACAM based on the proposal materials submitted and the requirements of this RFP and any future addenda thereto.

Respondents are advised to check that all parts of this RFP package have been received. Respondents shall be responsible for informing themselves with respect to all conditions, which might in any way affect the cost or performance of any of the work. Respondent(s) assumes risk for any conditions which might in any way affect the cost or performance of any of the work, and no relief shall be given for errors or omissions by the respondent(s).

VI. Confidentiality of Proposals

All proposals and information concerning same shall remain confidential until all negotiations are completed, and the preliminary notice of award is issued. Therefore, any part of the application that is not considered confidential, privileged, or proprietary under any applicable Federal, State, or local law shall be available for public inspection upon completion of the procurement process. Any material submitted by the respondent that is to be considered as confidential must be clearly marked as such; however, the applicable provisions of Federal, State, and local laws shall govern the confidentiality of proposals despite anything contrary to this provision stated in the application. A payment schedule will be negotiated with selected contractor(s). ACAM reserves the right to offer a contract award greater or less than the amount requested in the proposal and to request respondents submit a Best and Final Offer (BAFO).

VII. Unauthorized Sub-Contracting Prohibited

The Proposer shall identify whether any subcontractors will be used, if awarded, and/or if the Proposal is a joint venture with another firm. The successful Proposer shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFP (including, but not limited to, selling, or transferring the Contract) without the prior written consent of ACAM. Any purported assignment of interest or delegation of duty without the prior written consent of ACAM shall be void and may result in the cancellation of the Contract with ACAM or may result in the full or partial forfeiture of funds paid to the successful Proposer as a result of the proposed Contract as determined by ACAM.

VIII. Evaluation, Negotiation, and Selection

- Evaluation:
A designated committee evaluates each proposal in confidence and according to the description in this RFP. Points will be assigned for stated evaluation factors. A cost analysis will be conducted, and qualitative technical factors will be evaluated that include but are not limited to:
 - Appropriateness, thoroughness, quality of the proposal
 - Provider experience and/or demonstrated knowledge
 - Demonstrated successful past performance
 - Quality of proposed staffing

- Negotiation:
 - Negotiations may be undertaken with respondents to achieve the best and final offers
 - All negotiation procedures will be documented
- Selection:
 - Contracts will be awarded to responsible organizations whose proposals are most advantageous to ACAM. Selection of a successful contractor will be at the sole discretion of ACAM. If a contract is awarded, it will be awarded to the responsible firm(s) or individual(s) whose qualifications, price and other factors are deemed most advantageous to ACAM. Additionally, ACAM shall have the right to reject any and all proposals at its discretion and to negotiate portions thereof.
 - All respondents will be notified of ACAM's selection by email.

IX. Submission

Submit proposals by email to Sarah Malcolm, Director of Resiliency Programs, at admin@acamweb.org no later than **Monday, April 1, 2024 at 12:00 PM CST**. Proposals received late or incomplete will not be considered. The timestamp on the recipient email will serve as the official time of submission. Early submissions are encouraged to avoid delivery issues. ACAM is not responsible for errors that may occur that prevent the timely arrival of proposals by email.

ACAM will not provide assistance to any respondent in the preparation of a proposal, but will, however, answer questions submitted in writing through **Wednesday, March 20, 2024 at 12:00 PM CST** to Sarah Malcolm, Director of Resiliency Programs, at admin@acamweb.org Questions will not be accepted thereafter.

The respondent shall furnish such additional information that ACAM may reasonably require to provide a comprehensive proposal review. ACAM will not be liable for any cost incurred in the preparation of proposals.

X. Conditions

- A. Modification** - Proposers may modify proposals that have already been accepted by providing a written modification to ACAM. However, no proposal may be modified after the deadline for submission.
- B. Assistance** - Please direct questions in writing to Sarah Malcolm, Director of Resiliency Programs, at admin@acamweb.org.
- C. Sole Discretion of ACAM** - ACAM may accept or reject any or all responses under this request in its sole discretion.
- D. Proposal is not a Contract** - This Request is not a contract and does not obligate ACAM to pay for costs incurred by any proposer in connection with its proposal. Furthermore, ACAM is not obligated to contract with any proposer. ACAM reserves the right to engage none, all, or any portion of any proposed services. ACAM may negotiate a

contract with a proposer as a result of this request and that contract may or may not conform to the requirements of this request at the ACAM's sole discretion.

- E. Modification by ACAM** - ACAM may change any part of this request at any time prior to the submission deadline. Such modification will be provided to all potential proposers who have obtained this RFP.
- F. Public Information** - Materials submitted to ACAM as a part of this proposal are considered public information unless noted in the proposal as trade secret or proprietary information. Materials submitted to ACAM as a part of this proposal become the property of ACAM upon submission. ACAM is not responsible for the return of creative examples of work submitted.
- G. No Undue Influence**
- H.** No employee, member of a Board of Directors or other governing body, or representative of a proposer who submits a proposal under this Request for Proposals may have any contact outside of the RFP formal review process with any employee of or any member of the ACAM's Board of Directors for purposes of discussing or lobbying on behalf of respondent's proposal. Respondents are encouraged to formally submit all questions during the Question-and-Answer period and attend any optional RFP conference(s) offered.
- I.** No employee, member of a Board of Directors or other governing body, or representative of a proposer who submits a proposal under this Request may offer any favor, gratuity, inducement, or anything of monetary value to any employee of the ACAM, or any member of the ACAM's Board of Directors for purposes of influencing the evaluation of a proposal submitted under this Request. ACAM will reject proposals of those proposers who violate this condition.

XI. Grievance Procedures

Grievances arising from this RFP shall be processed in accordance with the posted Grievance Policy. This policy is posted to the ACAM website at <https://acamweb.org/funding-vendor-opportunities/>.

ACAM RFP No. ClientTracking-2024 Proposal Cover Sheet

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|--|--------------------------------|
| Organization (Offeror) Name and Address | Proposal Contact |
| Phone Number | RFP No. ClientTracking-2024 |
| Email Address | EIN OR TAX ID Number |
| Cage Code | Annual Budget |
| Unique Entity ID | # of Employees |
| <p>Name & Title of Certifying Representative. Note: “Certifying Representative” means the individual who may legally submit proposals for the agency and enter into agreements (i.e. the Chairman of the Board of a social service agency). You may identify a different contact person.</p> <p>Name: _____ Title: _____</p> | |

I hereby certify that all information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate to the best of my knowledge.

AND

The undersigned, as Proposer, certifies that the Proposer has not, either directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competition in connection with this contract. The Proposer certifies they have not and will not participate in the development, review, and/or selection process.

| | |
|--|--------------|
| Signature of Certifying Representative | Date |
| | |



**RFP No. ClientTracking-2024 Database & Data
Reporting Programming Services
RESPONSE FORM**

1. Executive Summary

Provide a brief summary of the firm's approach to the work associated with the requested services demonstrating an understanding of the scope of work required and unique or innovative approaches to be utilized in performing these services. (1,250 character maximum)

2. Experience and Qualifications

- a. Describe how long the respondent firm has been in business under the present name and structure. Provide any other names under which the firm has done business and the dates it operated under each name and the locations at which it operated under each name. (750 character maximum)

- b. Describe the respondent firm's experience in conducting comparable services, similar in scope to ACAM's requested services, during the most recent five-year period. (1,250 characters maximum)

- c. Provide a list of nonprofit organizations to which your firm has provided similar services. Briefly describe the services provided and the similarities to the scope of work described in the RFP. (1,250 characters maximum)
- d. Provide a brief description of the qualifications and experience the firm has in the various categories described in the Scope of Work, Certifications held, and attached résumés of the staff assigned to do this work. Describe the qualifications of the staff who will be assigned to provide services to provide services to ACAM and why they are best suited to work with ACAM including expertise with relevant software. (1,500 characters maximum)

3. Task/Activity Plan

Proposals should discuss direct experience with Apricot™ including working with systems that others have created and modified. The respondent will state how they will carry out contract requirements in the event of an illness or other circumstance that may limit the Contractor's ability to complete the work requested in this RFP (1,250 character maximum).

4. Estimated Fees

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|--|----|
| A cost per hour (hourly rate) | \$ |
| Any estimated in-kind or pro bono services | \$ |
| Net cost per hour (total cost less pro bono) | \$ |

5. Other Relevant Information (optional)

Proposer may include any additional information for consideration (1,250 character maximum).