Request for Proposal

Wake Connections
Database Development, Training and Support

Statement of interest due at 5:00 p.m. (EST), Friday, March 18, 2016
Proposals due at 5:00 p.m. (EST), Wednesday, April 6, 2016

sgomez@wakesmartstart.org
Phone: 919-723-9280
Fax: 919-851-9530

REQUEST FOR PROPOSAL
Wake Connections
Database Development, Training and Support

I. Purpose

To develop a user-friendly intake portal and secure online database for multiple agency users to implement a coordinated intake and referral system, and to generate program and evaluation reports.

II. Background

Wake County Smart Start (WCSS) provides services to ensure children birth to 5 are successful in school and life. A grant from the John Rex Endowment in 2013 allowed for the creation of Wake Connections, a coordinated intake and referral system for home based services, supporting young children birth to age 5 and their families. After the successful completion of the original three year grant, Wake Connections has received expansion grant funding for an additional three years. The database being requested would replace the existing database, incorporating project learnings and end user feedback to improve the user experience, and allowing for a broader scope of services to be offered through the system.

Wake County is one of the largest counties in North Carolina, with a population of over 76,000 children ages birth to 5, with roughly 17% living in poverty. The size and complexity of Wake County creates the challenge of assuring that resources are understood, easily accessible and utilized efficiently and effectively by community agencies and families to benefit young children and their families. Several local community assessments revealed confusion about available services and how to refer for services as barriers to linkage, emphasizing a need for system coordination. Though many families seek support, there has been no clear path to services, creating challenges to accessing help when needs arise.

The overarching goal of a coordinated intake and referral system is to bring together multiple stakeholders across the community, both referrers and service providers, into a collaborative system that facilitates linkage. Services provided to children and families are based on intentional and coordinated efforts among multiple agencies in order to utilize community resources efficiently and effectively and match available services to best meet families' needs. For families, this means that they have a trusted and accessible place to ask for help and for the professional community, this means that they have an effective linkage tool to facilitate appropriate referrals efficiently and track the intake process.

The Wake Connections system is designed so that community members submit an application, using a web-based application portal, which collects demographic information and guides respondents through a series of questions that synthesize the eligibility requirements of system partner programs. Applications are then reviewed and processed by the system administrator using the database to screen for program eligibility and disperse referrals to selected partner programs, who use the database to document the client's progression through the enrollment process, and ultimately closure. Procedures for reviewing applications and linking families with the appropriate service have been developed by Wake Connections and its partner programs. Each program has their own set of eligibility criteria.

The Wake Connections system currently involves a central system administrator and 8 partner programs, but the expectation is that both the number of partner programs and types of services offered will increase during this upcoming three year expansion grant.

To learn more about Wake Connections, please visit our website: www.wakesmartstart.org/wakeconnections
Supplemental information is available with the publication of this Request for Proposal to inform potential bidders on the characteristics of the system and the data collected.

III. Scope of Work

Develop and implement a custom database to deliver the Wake Connections system which includes: an online application portal for public access; a web-based, secure database to facilitate and track linkage with participating programs.

The database will function as a system to:
- Collect intake data
- Determine program eligibility
- Refer for service
- Track outcome of referrals: intake, enrollment, closure and impact
- Generate program and system level reports

The database should be easy to utilize (i.e. simple for community members to access and use), flexible (i.e. able to add new programs, modify application, edit program information) and adaptable over time (i.e. programming and technology support and/or administration training to make adjustments and implement changes).

A. Deliverables
- **Direct at least one face to face development meeting**
- **Develop prototype of user friendly online portal and database that includes the required functionalities and characteristics**
- **Test system with 2-4 users and make any revisions necessary**
- **Provide group and/or individual training for system administrators as well as end-users**
- **Provide ongoing technical assistance and support**
- **Make additions and revisions to database functionality and features as necessary**
- **Develop a transition plan for move from current database solution including legacy data migration**

B. Components and Considerations

In the current system the community generates a request for home based services using an online application form, which is reviewed and processed by a system administrator and then is sent to a partner program to document steps to enrollment and ultimately closure. The system administrator reports on system use data to assess program quality, address evaluation requirements, and identify community needs and gaps in services.

<u>Database Characteristics:</u>
- **Secure**: Access to family and child data needs to be secure and restricted to specific users.
- **Confidential**: Must have a mechanism for addressing confidentiality and levels of information access.
- **Flexible/Expandable**: Must have ability for modification to adjust data collected, reports generated, make changes to data sharing preferences. Must have ability to add new agencies, partner programs and users and the ability to inactivate (without deleting data) provider agencies, programs or users.
- **Optimized for Mobile Access**: Application portal should be easily accessible via smart phone and tablet both by referrers to the online portal and named users of the database. Ease of use for community members completing online application is prioritized.
- **Number of named users:**
  - 2-3 Administrative users
  - 8 home visiting partner programs (number expected to expand; may consider allowing multiple users per partner program)
  - Potential for community based users to create login to track the status of their submitted application(s) – should be optional (i.e. applications must still be able to be submitted without creating an account)

<u>Required Database Functionalities</u>

- <u>Online application portal:</u>
  - Ability to refer a family unit with multiple members on a single application
  - Open access to the community (users could include families, community referral agencies, providers, and system administrators)
  - Ability to hide and reveal dependent questions to guide respondents through relevant eligibility questions
  - Ability to set questions as required or optional

  - English / Spanish Bilingual application portal (Spanish translation to be provided); prefer the ability to select language based on user preference
  - Design informed by end user feedback to improve ease of use for community, with focus on non-professional and low literacy users

- System Administrator abilities:
  - Review application and process individual family members within a family unit to make referrals based on client need
  - Process referrals using database to run eligibility rule sets on multiple programs to screen for eligibility and fit (see supplemental materials for example of rule sets)
  - Assign families / individual family members to partner program to process for enrollment
  - Inform family, referral source, provider of referral progress (e-mail notification, SMS)
  - Link family members and add new applications to existing records
  - Update individual client records (example: partner follow up, service information)
  - Make updates including open text field comments, status changes documenting enrollment process and service history
  - View archive of all past comments on individual clients
  - Dashboard to summarize system information including applications, referrals, waitlists, partner capacity etc.
  - Export data

- Partner abilities:
  - Record results of referral from administrator (eligible, ineligible, no current capacity, family declines) and steps throughout enrollment process (initial contact with family, contact with referral source waitlist, enrollment, unable to contact, etc.)
  - Record service information at closure (required: date of enrollment, date of closure, reason for closure; optional: number of home visits and additional referrals made)
  - Make updates including open text field comments, status changes documenting enrollment process and service history
  - Update and view archived comment history including comments entered by previous system partners and system administrator
  - Update client record with demographic information, referral source information, other service providers
  - Inform system administrator and referral source of progress / changes in status (e-mail notification)
  - Communicate with system administrator regarding database questions, problems, suggestions
  - Dashboard to summarize partner program information including referrals, waitlists, partner capacity etc.

- Expansion capability:
  - New partner programs and new types of services
  - New / edit existing eligibility rule sets
  - New users within partner programs
  - Add new /edit existing questions to the intake portal, edit drop down menu options
  - Collect current capacity (number of families / children they can serve, estimate of wait time) of partner programs within the system to aid in processing referrals

- Reporting:
  - Partner program level and total Wake Connections system level data
  - Application information – characteristics of applications submitted to the application portal including demographics, family need information, referral sources, open text field comments
  - Referral information - overview of how referrals are processed and directed to partner programs
  - Enrollment information – overview of procedural and time interval elements (status changes) of process from when referrals are sent to a partner to when the client reaches a final disposition (enrolled, declined, denied)
  - Closure information – overview of closure process for enrolled clients including length of service, reasons for discharge, and other closure data such as service linkages, # of visits provided, etc.
  - Potential for user friendly ad hoc reporting
  - Capability to export

- Legacy data import:
  - Client records in current system including: client level information (application, client record, referrals), partner information (referrals, enrollments, waitlists, closures), system information (aggregate system use data) from Excel

- Training expectations:
  - 2-3 Wake Connections / Wake County SmartStart staff trained as administrators
  - End user training for 8 existing partner programs, and for possible additional partners

- Support expectations:
  - Support to address problems encountered after system goes live
  - Support to make changes and improvements
  - Support to implement planned expansion (e.g. adding new partner programs)

Optional Functionality

- Reporting:
  - Mapping capability to look at elements of system capacity
  - Flexible data visualization
- Text formatting:
  - Ability to spellcheck open text fields
- Appearance:
  - Ability to apply light branding – e.g. logo, color scheme or font
  - Ability to use basic text formatting – bold, underline, font color for help text, intake portal, case notes, etc.
- Communication:
  - Interface to send data electronically (allowing databases to talk to each other, import data from Excel)
  - Sign in with Facebook plugin for community members submitting applications

IV. Project Proposal Timeline

- Proposal awarded: April 20, 2016
- Start date: May 4, 2016

V. Proposal Instructions

- **Statement of Interest:** In order to know how many bids we can expect please send a brief e-mail by **5:00 PM EST Friday, March 18, 2016** informing us of your intention to submit a proposal.
- **Prepare a proposal** describing your/your company's background and qualifications, experience addressing similar needs or systems, technical requirements, and methods and timetable for completion of the deliverables specified in IIIA.
  - Include a timeline that covers the deliverables specified above as well as additional major milestones and approval process steps for development / implementation.
  - Describe how technical support is provided and who provides it. If there are multiple options for technical support, please describe and identify pricing differences.
  - If bidder is a single person operation, please describe support capabilities for when you are unavailable (vacation, illness, etc.).
  - Please indicate if you will be proposing a completely new and individualized database or if you have an existing system you plan to adapt to our specifications.
- **Provide three references** (current or former clients) and be available to provide a demo of at least one similar product upon request.
- **Prepare a line item budget narrative**.
  - Note: We encourage you to provide multiple budgets reflecting different cost and service options.
- Available funding range provided upon request.

Supplemental Materials are available upon request.

Proposals containing the above information are due by 5:00 PM on Wednesday, April 6, 2016.

Please send Statement of Interest and Proposal to Sasha Gomez at sgomez@wakesmartstart.org

If you have any questions related to this bid, feel free to contact Sasha via e-mail or by phone at 919-723-9280.