Community Renewal Team, Inc.
555 Windsor Street
Hartford, CT 06120

Request for Proposal

COMMUNITY RENEWAL TEAM, INC.
RFP CRT STEPS Improvements

INDEX

Section Number | **Page Number**

INVITATION TO BID

Beginning July 3, 2019 until July 29, 2019 the Community Renewal Team, Inc. (henceforth referred to as "CRT") is having an open Request for Proposal (RFP) for qualified technology development organizations which specialize in Salesforce to improve and expand the functionality of the case management system called STEPS which is built on the Salesforce platform.

- Beginning July 3, 2019, quote specifications may be downloaded on the CRT web site: www.crtct.org Business Solutions/Vendors and the State Portal at www.biznet.ct.gov.
- **BY EMAIL:** Proposals will be accepted by electronic mail in PDF format to crt-bids@crtct.org , The subject line must read "CRT STEPS Improvements RFP Submission" however no responsibility will be attached to any person or persons for the non-receipt of a proposal submitted by electronic mail due to spam, incorrect email address, or any other like circumstance. The proposal and samples of work sent by email must be received by Monday, July 29, 2019 at 3:00 p.m.
- A mandatory bidder's meeting will be held by on July 12, 2019. Please register via email to dunbarj@crtct.org using the subject line "CRT STEPS Improvements RFP – BID MEETING": by close of business on Tuesday, July 9th by 4:01 pm, ET. This email must contain the name and email address for the person responsible for coordinating bidder attendance as this meeting will be virtual and the invitation will be made via email. If a vendor has questions in regards to the proposal, we ask that you please submit your questions via email to: dunbarj@crtct.org . Questions will be taken at the bid meeting. No questions will be answered at the bid meeting. All questions and answers will be provided via email to all companies that attended the bid meeting within five (5) business days of the proposal deadline.
- **QUESTIONS:** Please direct all questions regarding this RFP to Jeanette Dunbar at dunbarj@crtct.org .
- Quotes from companies with prior experience working with non-profits will be considered.
- Late bids will not be accepted – no exceptions.
- Quote must be submitted on the prescribed form.
- Please submit a bid for the overall project.
- CRT is exempt from State or Federal taxes.

ORGANIZATIONAL OVERVIEW

Community Renewal Team (CRT) is a 501(c)(3), not-for-profit organization, and the designated anti-poverty community action agency for both Hartford and Middlesex Counties. Founded in 1963, CRT is committed to helping people meet their basic needs while promoting and supporting self-sufficiency. CRT's mission is: "Preparing Our Community to Meet Life's Challenges."
Connecticut is one of the wealthiest states in the nation, yet far too many in our state continue to live in poverty. CRT carries out its mission by creating, coordinating, and delivering a broad array of programs and services to our communities. In 2018, 67,109 individuals/28,166 families benefitted from our programs and services. This includes: Behavioral Health Services, Energy Assistance and Weatherization,

Elderly Nutrition Services, Early Care and Education, Veterans' Services, employment and training, housing assistance and services, an affordable assisted living facility and many more. Our largest program is Energy Assistance, which kept 39,862 individuals warm during the winter months.

PROJECT PURPOSE

The Community Renewal Team (CRT) is seeking proposals from a qualified technology development organization which specializes in Salesforce for the purposes of improving and expanding the functionality of an internally developed case management system called STEPS which is built on the Salesforce platform.

STEPS is a comprehensive, outcome-driven case management software created by CRT utilizing the Salesforce platform nearly a decade ago. This system, designed for community action agencies, has a user interface designed for case workers and their management team. The STEPS application combines client intake, assessment, regular re-assessment, and outcomes into a single information management system. CRT clients can present at any CRT program location for enrollment and data collected for the client are logged into a single case file in real-time, making information immediately available for all other case managers and staff of CRT's programs and services. This allows for monitoring over time and across programs so staff can track clients' progress toward the goals which are set up and recorded within the software to create client's individual service plans, or ISPs. Duplicate intake work is eliminated and efficiency of referrals is increased and redirections decreased. In this manner, CRT is able to coordinate services and provide truly comprehensive case management for clients. Two other Community Action Agencies have purchased and use the software for their case management.

In the years of use since the initial development of STEPS, a number of implementation, design, and functional improvements have been identified and must be addressed in order for the software to meet internal, funder, and external customer requirements. The purpose of this RFP is to secure a software and technology development partner who can update the STEPS software such that it meets these needs. Additional feature requests and a desire to leverage the tool with an expanded focus on data driven analysis and decision making is also an important aspect of this RFP. Particular attention should be given to ensuring that the solutions recommended are based upon best practices and industry standards and position CRT such that it is in alignment with the trajectory of the Salesforce platform.

This development project is intended to improve and increase the functionality of the STEPS application in the following areas, as described in detail in the Scope of Work section:

- **Software Platform**
- **Data Integrity & Application Security**
- **Reporting & Data Analysis**
- **Functional Improvements: Case Management**
- **Functional Improvements: Program Management**

- **Referral Tracking**
- **Organizational Efficiencies**
- **STEPS Customer Standardization**
- **Stretch Goals**

For informational purposes, CRT is also conducting a separate, yet related and concurrently running project (not part of this scope of work), to redevelop the CRT website, which is currently running on an outdated platform. The website will be rebuilt and deployed on a content management system with the intent of delivering new content faster and easier, not only saving time and money for the agency, but providing clients and potential donors easier access to CRT information and programs.

These projects are related in that we would like the website to feed information, where appropriate, directly into Salesforce; for example, client intake information.

RIGHT OF THE OWNER TO TERMINATE CONTRACT

Failure of a contractor to deliver within the time specified or to deliver within the time extended by CRT, and failure to make replacements of rejected articles when so requested, immediately or as directed by CRT shall constitute contract default.

RIGHT OF REJECTION

This is not an offer to contract. Acceptance of a proposal neither commits CRT toward a contract to any bidder, even if all requirements stated in this bid are met, nor limits the right to negotiate in the best interest of CRT. CRT, in its sole and absolute discretion, reserves the right not to contract with any bidder for any reason.

CRT also reserves the right, in its sole and absolute discretion, to accept or reject any and all bids in whole or in part, to waive any irregularity and/or informality in any bid and to request and receive additional information from any bidder when such acceptance, rejection, waiver or request as deemed by CRT to be in the best interest of CRT.

Community Renewal Team, Inc. may reject or accept any and all bids in whole or in part or to waive any informality in bids received if in their opinion, it is deemed in the best interest of the organization to do so.

INDEMNIFICATION AND INSURANCE

The selected contractor shall at all times indemnify and hold harmless CRT and its officers, agents and employees on account of and from any and all claims, damages, losses, judgments, workers compensation payments, litigation expenses and legal counsel fees arising out of injuries to persons (including death) or damage to property.

The contractor shall carry liability insurance, which shall include coverage for, acts of independent contractors or sub-contractors. Such policy shall include the minimum coverage's detailed below.

- The Contractor shall provide liability insurance and name "Community Renewal Team, 555 Windsor Street, Hartford, CT 06120" as *additional insured* on the Certificate of Insurance.
- Contractor shall provide a Certificate and other evidence of such insurance to CRT at the signing of the agreement and upon demand any time thereafter during the duration of this agreement in amounts acceptable to CRT not less than the following:
    - General Liability ($1,000,000 each occurrence/$2,000,000 general aggregate);
    - Automobile Liability ($1,000,000 each accident);
    - Professional Liability ($1,000,000 each occurrence);
    - Umbrella Liability ($1,000,000 each occurrence);
    - Cyber ($1,000,000 each occurrence);
    - Workers Compensation ($1,000,000 each accident, $1,000,000 each employee, $1,000,000 disease policy limit); and
    - Performance bond naming the State of CT as a co-obligee in an amount not less than 50% of the bid (covering the labor and material of the selected contractor for the project) must be submitted and on file with the State administering agency prior to payment of invoice(s).

EQUAL OPPORTUNITY - AFFIRMATIVE ACTION

CRT shall not enter into any contract for purchasing with any person, agency, or organization if it has knowledge that such person, agency, or organization discriminates against any applicant, employee, or service recipient on the basis of race, color, religion, national origin, sex, age, sexual orientation or disability; or any person, agency, or organization who fails to comply with all federal and state anti-discrimination laws.

CONFIDENTIAL INFORMATION

During the course of its contract with CRT, Contractor may encounter confidential agency and/or client information. Contractor agrees, as a condition of this bid to save and protect any such confidential information, shall hold the same in confidence, shall not use the Confidential Information other than for the purposes of its business with CRT, and shall not disclose it to anyone without the specific prior written authorization of CRT.

METHOD OF AWARD

Bids will be awarded to the most responsible, responsive and qualified bidder as determined by CRT.

Interviews may be scheduled with candidates that have submitted proposals as part of the selection process.

The delivery date shall be a factor considered in awarding a Contract and may result in an award offered to a vendor other than the low bidder.

Until a contract has been executed, no vendor can claim any contract rights by virtue of the receipt of the notice of acceptance of proposal alone. Awarding of the contract shall mean that a contract agreement has been executed by both the accepted vendor and CRT.

CRT reserves the right to add, modify or delete the proposal requirements or terminate the RFP without awarding this project to a vendor. The decision of CRT is final and cannot be appealed.

In the event that there is a discrepancy between price written in words and in figures, the price written in words shall govern.

ERRORS, INTERPRETATIONS AND ADDENDA

All information given by CRT except by written addenda shall be informal and shall not be binding upon CRT nor shall it furnish a basis for legal action by any bidder against CRT.

DOCUMENTS TO BE SUBMITTED

- Bid Form (Attachment D)
- Quote Form (Attachment E) along with all "Other Requirements" as outlined on Page 18
- Reference form (Attachment F)
- Sample Certificate of Insurance (COI) as outlined in Indemnification and Insurance on Page 4

PROJECT SCOPE & GUIDELINES

Vendors will submit detailed proposals which will evaluate CRT's current STEPS/Salesforce application, and develop and implement the necessary improvements, or redevelopment if required, to provide the functionality as outlined below:

1. Software Platform:

STEPS was originally developed with a significant number of custom objects in order to utilize less expensive platform licenses; the current environment contains 15 Enterprise Licenses and 115 Platform Licenses. In addition to custom objects, the application is almost completely built leveraging visual force pages. This code heavy highly customized environment has proven to be overly cumbersome and cost prohibitive to maintain, modify, and expand upon.

The selected vendor will work to bring the existing environment up to a best practice state and work to bring the STEPS application to native Salesforce functionality such that CRT can best leverage Salesforce's "No Code" mantra. Ultimately, CRT is looking to further leverage the Salesforce platform while minimizing recurring licensing and development costs.

- Vendor is to address and correct the existing system such that CRT has access to and can leverage the power of the Salesforce ecosystem.
- Vendor is to address and include solutions as to how the existing STEPS application can be adapted to leverage the latest functionality within the Salesforce ecosystem as well as to best position CRT to leverage platform developments, both current and future. Including:
  - Lightning Platform & Mobile Applications
  - Other suggested/recommended Salesforce tools; Chatter, Communities
  - Integrations with other platforms and services
- Vendor is to address UI/UX design such that users (primarily case managers) find the updated application (STEPS) user friendly and easy to maintain client data while at the same time the underlying application easily keeps the client record error free and complete
- Vendor is to address and include solutions which mitigate recurring licensing costs and reduce the need for continued engagement with software developers.

2. Data Integrity & Application Security:

<u>Client Demographic Data</u>

Community Action Agencies track participants at both the individual and family level, and collect a broad array of data points and required elements which vary by program. It is imperative that the STEPS software application be able to produce an unduplicated count of clients and families served in any given period, together with the services those families receive, as well as generate a report on the characteristics of clients at point of entry as well as throughout their case period. **Attachment A** to this RFP is a sample client demographic report required of all agencies. The following concerns must be addressed:

- Automatic Client Duplication Checking. Since incoming clients may access services at CRT through any number of different programs, an effective and efficient system to confirm that clients entered into the system are automatically checked for existing records within the system.
- Address validation. Client addresses must be validated and geocoded. Additionally data entry validation tools must be able to standardize the city, town, and zip code syntax.
- Demographic field validation – in order to avoid data entry errors, client characteristics must be validated across characteristics. For example, a male client cannot be flagged as pregnant; an unemployed client cannot have an active employer identified, etc.
- Participant/Contact Object – Given the requirement to follow a best practice model, the vendor is required to evaluate the existing model, where CRT clients are represented by a custom object, called "Participant" and determine its efficacy compared to the standard Contact object within the Salesforce NPSP or other representation. Vendor is to then implement recommendations. See section on **Organizational Efficiency**, where other contact types are desired to be represented.
- Household/Family Relationship – Given the requirement to follow a best practice model, the vendor is to evaluate the existing Household relationship model, which is a custom object called "Family", determine its efficacy compared to the standard Household model within Salesforce NPSP or other representation. Vendor is to then implement recommendations. See section on **Organizational Efficiency**, where other contact types are desired to be represented.
    - Head of household must be tracked.
    - Vendor to provide solution where CRT can also model alternative family relationships. For example child participants (clients) who reside in two different households, or grandparent families who care for grandchildren.
- Ensure that all demographic data are best represented according to funder specifications. Please see **Attachment C.**

<u>Application Security</u>

Due to the personal nature of client demographic information, CRT is acutely concerned about the protection of client information. In addition to Personally Identifiable Information (PII), which is normally part of a client case file, CRT also maintains HIPPA data within case files for clients receiving behavioral health and HIV/AIDS related services. The following concerns must be addressed:

- Overall ensure that STEPS application is HIPPA Compliant.

- Client PII and HIPPA information is sufficiently protected across and within programs. Data for clients who may be receiving services across programs must be protected between programs. For example, if a client is receiving both energy assistance and behavioral health services, the client HIPPA information is not visible to the energy program case worker, yet income data to determine program eligibility is accessible to both.
- Security settings are updated and implemented such that they are both <u>secure</u> and <u>easily manageable by CRT system administrators</u>.

3. Reporting & Data Analysis:

Reporting in the existing STEPS environment has proven to be limited due to the existing data structures and the application's reliance upon Visual Force pages which has made it challenging to relate data elements together and produce meaningful report results and analysis. The vendor will recommend and implement the necessary software modifications to:

- Provide native functionality to produce funder mandated reporting as described in Client Demographic Data of this document. (See **Client Demographics** Section reference to **Attachment A**)
- Provide functionality to produce reporting of clients served and services provided based upon a variety of criteria such as:
    - Client City or Town of Residence,
    - Location of service provided (where did CRT provide the service)
- Provide functionality to track quantities of goods delivered to clients as part of a service delivery. For example; diapers, food, or a unit of education.
- Provide the ability to easily develop dashboards which program managers, quality assurance teams, and senior leadership can use to manage their respective areas. Data should be structures such that information easily rolls up to produce program, unit, department, and organizational reporting.
    - For example, how many new clients did a particular case manager see in a reporting period, or how many existing clients did a particular case manager see in a reporting period.

4. Functional Improvements: Case Management

The ability for the STEPS application to provide effective case management of CRT clients is the primary function of this application and is therefore a critical aspect. This proposal must provide a software solution such that case managers have the following functionality:

- Universal or Central Intake – clients can present at any CRT program or location where their information can be entered into the system and subsequently picked up by the relevant program(s) for enrollment in services.
    - Leverage electronic customer sign-ins at service centers to capture customer information once and initiate the construction of a new or potential client.
    - Leverage sign up forms embedded in public facing website to capture customer information and direct to resources or initiate the construction of a new or potential client.
- Pre-Assessment – case managers complete a 10 question pre-assessment questionnaire which calculates a score that is use to determine if a client is a candidate for Intensive Case Management. This assessment is done once.
- OSM Assessment – Clients are assessed via the Outcome Scale Matrix, a 21 dimension assessment conducted during the initial visit and subsequently every 90 days (See **Attachment B**). This assessment determines client self-sufficiency by calculating a score which is used to classify the client as Thriving, Safe, Stable, Vulnerable, or In Crisis. For reporting purposes, this assessment is typically associated to the head of household; however, individuals within the household may also be assessed.
    - OSM results are tracked over time.
- Individual Service Plans (ISP). The results of the OSM are utilized to create an ISP which is a unique and individualized set of goals which the client determines is important for their success. The ISP includes a goal, or set of goals, along with the associated action steps, services, tasks, milestones, case notes, and anticipated outcomes created to help accomplish goals.
    - Progress is monitored and tracked to ensure progress towards goal attainment.
- Goals – Currently the descriptive text is a free form text description of what the client sets as a goal, which is a component of the ISP. Goals have a created date, target date, department name, program name, and OSM dimension. Goals have a status (Progressing, Achieved, Exited).
- Action Steps –Action steps are essentially the milestones of the goal and have free text names and descriptions. A responsible party, target date, and status is assigned.
- Services – Services are what CRT delivers to the client. The goods and services that CRT produces. Services contain a department name, program name, service name, and service date
    - Each Service has associated ROMA Service/Indicator Code and an associated Outcome Code. (See **Attachment C**)
    - Each service delivered (transaction) should be tagged with client current town and zip
    - Each service delivered (transaction) should be tagged with location of service delivery
- Case Notes – case notes can be created at any point during the creation of case items.
- Interactions – creating a service, goal or case note creates an interaction with a client and is used to record an interaction with a client

- Email(s) with client to and from system – a desired function is to be able to log and record email conversations with clients which also count as an interaction.
- Electronic Signature Capture – a desired function is to be able to capture and store an electronic signature.
- Production of enrollment forms which may be required by outside agencies and/or funders – a desired function is to be able to utilize the electronic signature along with the ability to merge client data to produce any required paper forms from the system.

5. Functional Improvements: Program Management

General Program Management

The ability to create new programs and services within programs must be improved. Currently program services are replicated across programs (multiple entries of same service are created for each program) which create reporting and management challenges. Programs and services functionality must include:

- Ability to create new programs
- Ability to create services linked to programs
- Ability to activate or deactivate services as a result of changing funder requirements or funding availability
- Eligibility Determination – each program offered through CRT has its own set of eligibility requirements. In a very rudimentary way, CRT would like the system to be able to evaluate participant/client demographics and OSM assessments and make program recommendations and subsequent referrals (See Case Management Section) with the caveat that further determination of eligibility may be required by the individual program.

Program Specific Software Applications

Community Action Agencies use a variety of different systems for client tracking and case management and many agencies use multiple systems due to funder requirements. Vendor proposals should include providing an overview and strategy for the integration of funder mandated system(s) data into STEPS. The main purpose of this requirement is to avoid data entry across multiple systems. Some funder systems have available open APIs. Vendors are to provide a cost estimate for integrating data from our EHR system into STEPS via the available API. The current EHR system is called AdvancedMD.

6. Referral Tracking:

Because CRT utilizes a comprehensive customer intake methodology and provides clients with coordinated service delivery options, a necessary system function is the ability to make intra agency referrals as well as inter agency referrals with external partners. The need is for the system to track referrals and provide the ability for reporting metrics on which of the referrals were followed up on and

Community Renewal Team, Inc.
555 Windsor Street
Hartford, CT 06120

what the outcome was. Likewise, it is important to establish a notification workflow so that if a client is referred to a case manager or partner that they are notified that the referral was made to them. Making a referral should trigger a workflow or some other alert or action indicating to the user and person delivering the referred to service that the referral was made.

7. Organizational Efficiency:

The vendor proposal should include and develop functional solutions such that CRT can leverage Salesforce/STEPS for improved organizational efficiency.

- Expand the number of record types supported within the organization to allow:
  - CRT Employee(s) – where employees can be related to clients, programs and departments
    - Additionally, for programs requiring licensing or certifications, allow for a method to track these as well as expiration dates such that departments and programs can report on their respective employees.
  - CRT Partner Organizations – where partners can be related to employees and programs. This will be useful when tracking referrals across organizations (see Referral Tracking Section above)
  - CRT Donors & Funders
    - How can CRT leverage Salesforce for donor management and potentially replace the existing donor management system
    - Link donors and or funders to programs to provide improved relationship management and reporting
  - Volunteer(s) – use Salesforce to track volunteer engagement and improve reporting on volunteer contributions (time donations), both individual and corporate/organizational.
- Development of a Grant/Program object type
  - Provide the planning and finance departments a way to track program and funder requirements.
    - Milestones
    - Reporting Deliverables
    - Etc.
  - Mobile Application(s) & Functionality

8. STEPS Customer Standardization:

Existing non-CRT organizations that have purchased the STEPS application from CRT are currently operating on different Salesforce packages. Vendor will provide a recommendation and price quotation for moving all three STEPS environments to the same version/package so that CRT can best support existing customers and efficiently grow the user base. For budgetary reasons, vendor can provide two cost options, one for a full service conversion, and a second which provides the mechanism for distributing the package where CRT IT staff can manage the data conversion and import of customer data into the new package.

9. Stretch Goals:

As the Community Renewal Team has invested in the Salesforce platform, the selected vendor should provide a roadmap such that CRT can leverage additional functionality offered by the Salesforce ecosystem. The following are some potential areas where CRT would like to consolidate tools or leverage technology for increased efficiency:

- Call Center Management – CRT maintains a call center that supports an energy assistance program which processes over 21,000 applications annually. Integrating call center functionality into Salesforce could offer improved efficiencies by linking client data to call center operators who can then coordinate services with other programs within the organization.
- Leveraging Artificial Intelligence and Chat Bots for initial customer contact. Mobile devices are pervasive across socio-economic boundaries. As CRT looks to deliver services at scale, if we look to leverage technology which can automatically direct clients to the right resources. We would look for this as a bi-lingual tool.

<u>**Vendor Requirements**</u>

CRT offers a wide range of programs and services simultaneously to the audiences we serve. We require a vendor with significant and relevant experience with large organizations operating at the size and scale of CRT's programs. We have several vendor requirements:

- <u>Organization Size, Structure, Location, and Areas of Practice</u>
  - Responding vendors must have physical (brick and mortar) offices within the tri-state (CT, NY, MA) area as well as have a positive reputation and national presence working with large nonprofit organizations.
- <u>Prior Experience</u>
  - Responding vendors must have specific experience delivering successful software implementations to large nonprofit organizations within the Salesforce ecosystem.
  - Responding vendors must have specific experience delivering successful software solution(s) for nonprofit case management systems.
- <u>Project Timeframe</u>
  - Responding vendors must be able to meet the project timeframe for completion of all development work. Project work including all discovery, software development, coding, data conversion, implementation, debugging, troubleshooting and deployment must be completed by April 15, 2020

Community Renewal Team, Inc.
555 Windsor Street
Hartford, CT 06120

ATTACHMENT A
ROMA DEMOGRAPHICS REPORT 2018

All STS Participants

A Total unduplicated number of all INDIVIDUALS about whom one or more characteristics were obtained	**19,623**
B Total unduplicated number of all HOUSEHOLDS about whom one or more characteristics were obtained	**9,035**

C. INDIVIDUAL LEVEL CHARACTERISTICS

1. Gender	Number of Individuals
a Male	8,569
b.Female	10,994
c Other	1
d Unknown/not reported	59
eTOTAL (auto calculated)	**19,623**

2. Age	Number of Individuals
a 5 and below	2,772
b 6-13	3,305
c 14-17	1,589
d 18-24	1,826
e 25-44	5,271
f 45-54	1,973
g 55-59	858
h 60-64	668
i 65-74	823
j 75 and over	533 00
k Unknown	5 00
lTOTAL (auto calculated)	**19,623**

3. Education Levels	Number of Individuals [ages 14-	[ages
a 0-8	796	270
b 9-12/non graduates	1,535	1,811
c high school grad/GED	686	4,824
d 12+ some post secondary	249	1,440
e 2 or 4 year college graduate	59	1,066
f Graduate of other post-secondary s	8	71
g Unknown	82	644
hTOTAL (auto calculated)	**3,415**	**10,126**

4. Disconnected Youth	Number of Individuals
a a 14-24 neither working or in school	375

5. Health	Yes	No	Total*
a, Disabled	2,073	17,025	**19,098**
b Health insurance*	17,658	897	**18,555**

*If an individual reported that they had Health Insurance please identify the source of health insurance below

Health Insurance Sources

c 1 Medicaid	1,364
c 2 Medicare	169
c 3 State Children's Health Insurance Program	1,180
c 4 State Health Insurance for Adults	1,051
c 5 Military Health Care	69
c 6 Direct-Purchase	22
c 7 Employment Based	216
b 8 Unknown/not reported	716

6. Ethnicity/Race	Number of Persons*
a. Ethnicity	
a 1 Hispanic or Latin	7,920
a 2 Not Hispanic or Latin	11,385
a 3 No Response	318
a.4 TOTAL (auto calculated)	**19,623**
b. Race	
b 1 African American	7,731
b 2 White	4,241
b 3 American Indian/Alaska Native	143
b 4 Asian	208
b 5 Hawaiian/Pacific Islander	80
b 6 Biracial/Multi-Race	1,071
b 7 Other	2,385
b 8 Unknown/not reported	3,764
b.9. TOTAL (auto calculated)	**19,623**

. Military Status	Number of Individuals
a Veteran	0
b Active Military	2
c Unknown/not reported	15
d TOTAL (auto calculated)	**17**

8. Work Status (Individuals 18+)	Number of Individuals
a Employed Full-Time	616
b Employed Part-Time	406
c Migrant Seasonal Farm Worker	0
d Unemployed (Short-Term, 6	20
e Unemployed (Long-Term, more	7
f Unemployed (Not in Labor Force)	10
g Retired	3
h Unknown/not reported	105
lTOTAL (auto calculated)	**1,167**

b.9. TOTAL (auto calculated) 4,787

D. HOUSEHOLD LEVEL CHARACTERISTICS

9. Household Type	Number of Households
a Single Person	4,346
b Two Adults NO Children	475
c Single Parent Female	2,860
d Single Parent Male	155
e. Two Parent Household	769
f Non-related Adults with Children	14
g Multigenerational Household	126
h Other	290
i Unknown/not reported	0
J TOTAL (auto calculated)	**9,035**

10. Household Size	Number of Households
a Single Person	4,345
b Two	1,630
c Three	1,376
d.Four	924
e Five	507
f Six or More	253
g Unknown/not reported	0
H TOTAL (auto calculated)	**9,035**

11. Housing	Number of Households
a Own	791
b Rent	6,660
c Other permanent housing	3
d Homeless	589
e Other	353
f Unknown/not reported	639
G TOTAL (auto calculated)	**9,035**

12. Level of Income	Number of Households
a. Up to 50%	3,901
b 51% to 75%	903
c. 76% to 100%	1,132
d 101% to 125%	733
e 126% to 150%	604
f 151% to 175%	417
g 176% to 200%	383
h. 201% to 250%	526
I 250% and over	436
j TOTAL (auto calculated)	**9,035**

13. Household Income	Number of Households
a Income from Employment Only	2,039
b Income from Employment and Other	1,639
c Income Employment,Other and Non-Cash	192
d Income from Employment and Non-Cash	317
e Other Income Source Only	2,538
f Other Income Source and Non-Cash	410
g No Income	1,082
h Non-Cash Benefits Only	235
i Unknown/not reported	583
J TOTAL (auto calculated)	**9,035**

14. Other Income Source	Number of Households
a TANF	512
b Supplemental Security Income (SSI)	1,045
c Social Security Disability Income (SSDI)	882
d VA Service-Connected Disability Comp	0
e VA Non-Service-Connected Disability Com	2
f Private Disability Insurance	1
g Worker's Compensation	36
h Retirement Income from Social Security	1,037
i Pension	292
j Child Support	473
k *Alimony or other Spousal Support*	14
l Unemployment Insurance	467
m EITC	0
n Other	5,429
o Unknown/not reported	1,082

15. Non-Cash Benifits	Number of Households
a SNAP	651
b WIC	94
c LIHEAP	112
d Housing Choice Voucher	136
e Public Housing	110
f Permanent Supportive Housing	85
g HUD-VASH	11
h Childcare Voucher	3
i Affordable Care Act Subsidy	2
j Other	242
k Unknown/not reported	513

Community Renewal Team, Inc.
555 Windsor Street
Hartford, CT 06120

ATTACHMENT B
OSM_W21_DIMENSIONS_11-29-2016

Dimensions/ Benchmarks	Income	Employment	Job Retention	Education	English Language Proficiency – ESL Participants	Job Skills/Training
Thriving 9-10	(10) >300% of poverty adjusted for family size (9) Between 276% and 300% of poverty adjusted for family size	(10) Full time work above minimum wage with employer provided benefits	(10) Maintained employment over 12 **consecutive** months	(10) Post-secondary degree including associates, bachelors, masters or doctorate	(10) **Advanced** reading, writing and speaking English proficiency	(10) Certification or license from a training program of one year or longer or has comparable job/training skills
Safe 7-8	(8) Between 251% and 275% of poverty adjusted for family size (7) Between 226% and 250% of poverty adjusted for family size	(8) Full time work above minimum wage w/minimal or no employer benefits	(8) Maintained employment between 7 and 12 **consecutive** months	(8) Post high school vocational education, non-college business or technical or professional training or some college credits	(8) Has **Adequate** reading, writing and speaking English proficiency	(8) Certification, license or other credential from a training program of less than 1 year
Stable 5-6	(6) Between 201% and 225% of poverty adjusted for family size (5) Between 176% and 200% of poverty adjusted for family size	(6) Full time work at minimum wage with employer provided benefits (5) Full time work at minimum wage w/out employer provided benefits	(6) Maintained employment between 3 and 6 **consecutive** months	(6) High School diploma, high school equivalency, or GED	(5) Limited or no English proficiency, but currently attending program to gain proficiency	(6) Attending program leading to certification or credential, no previous certification or credential (5) Retraining required for new career path
Vulnerable 3-4	(4) Between 151% and 175% of poverty adjusted for family size (3) Between 126% and 150% of poverty adjusted for family size	(4) Seasonal or temporary employment only (3) Part time employment with benefits	(4) Maintained employment for less than 3 **consecutive** months (3) Maintained employment for less than 1 month	(4) Basic reading, writing and math skills present, possible ABE, no GED/High School Diploma	(4) Speaks basic English but is not proficient in the language (3) Able to speak English, unable to read/write in English	(4) Job skills training/retraining needed to keep current job (3) Has job or marketable skills, but training needed for adequate employment
In Crisis 0-2	(2) Between 101% and 125% of poverty adjusted for family size (1) Between 50% and 100% of poverty adjusted for family size 0) Between 0% and 49% of poverty adjusted for family size	(2) Part time employment w/out benefits (1) Unemployed with work history and skills (0) Unemployed w/out work history or skills	(0) In job search, unemployable, or **never has been employed**	(0) Basic reading, writing, math skills absent	(0) Has not learned English, Limited English proficiency, with negative life impact	(0) Has no identified training or job skills

Dimensions/ Benchmarks	Housing	Health Insurance - Adult	Health Insurance - Children	Transportation	Child Care	Household Budgeting
Thriving 9-10	(10) Housing of choice, such as homeownership or non-subsidized rental housing	(10) All adults have comprehensive health insurance	(10) All children have comprehensive health insurance	(10) Affordable personal vehicle available, car adequately insured, driver(s) licensed	(10) Child enrolled in unsubsidized, licensed, child care of choice	(10) Household maintains a savings account equivalent to 6 months of expenses or more, no subsidized benefits
Safe 7-8	(8) Safe and secure non-subsidized housing, choice limited due to moderate income	(8) All adults have subsidized health insurance	(8) All children have subsidized health insurance	(8) Transportation is readily available and affordable to meet basic travel needs	(8) Child enrolled in licensed, subsidized child care of own choice (7) Child enrolled in licensed, subsidized childcare, limited choice	(8) Availability of some discretionary funds for household spending, has savings account, no subsidized benefits, other than health care
Stable 5-6	(6) Safe and secure subsidized rental, Section 8 or public housing (5) Transitional Housing (Program)	(5) All adults have minimal or inadequate health insurance	(5) All children have minimal or inadequate health insurance	(6) Transportation is available but is sometimes unreliable or unaffordable	(6) Child provided childcare by a family member or friend (e g Kith & Kin)	(6) Able to support basic living expenses, expenses do not exceed income, no subsidized benefits other than health care
Vulnerable 3-4	(4) Temporary housing (3) Unaffordable housing	(4) Some adults have health insurance	(4) Some children have health insurance	(4) Dependent on others for all transportation needs (3) Has car, unable to maintain, unlicensed, or uninsured	(4) Childcare arrangement is temporary or undesirable (3) Child on waiting list for enrollment in child care	(4) Able to support basic living expenses, dependent upon receiving subsidized benefits
In Crisis 0-2	(2) Temporary shelter (1) Substandard or unsafe housing (0) Homeless	(0) No adults have health insurance	(0) No children have health insurance	2) Transportation is inadequate, unreliable or unaffordable (0) No access to transportation	(2) Child not enrolled in childcare (0) Child enrolled in unregulated or unlicensed childcare facility	(2) Unable to support basic living expenses while receiving subsidized benefits (0) Unable to support basic living expenses and not receiving subsidized benefits

Dimensions/ Benchmarks	Food Security	Community Involvement	School	Child Behavior	Juvenile Justice	Physical Health
Thriving 9-10	(10) Family able to afford food of choice without food bank or food stamps	(10) Person has a leadership role in the community or school by running a committee, organization or other activity	(10) Child(ren) is a "B" (3 0) or better student	(10) Child(ren) has demonstrated no behavioral issues for 6 months or more	(10) Child(ren) has never been involved in juvenile justice system	(10) No untreated chronic illness and maintaining pro-active preventative medical and dental care practices
Safe 7-8	(8) Family is able to afford most food of choice without food bank or food stamps	(8) Person is active in their community or school by serving on a committee, organization or other activity	(8) Child(ren) attends school regularly and passes all classes	(8) Child(ren) has behaved inappropriately in the past, but behavior is improved overall	(8) Child(ren) has had no involvement with juvenile justice system for over one year	(8) No untreated chronic illness Receiving regular medical care
Stable 5-6	(6) Family able to afford some food, occasional use of food bank, does not receive food stamps (5) Family able to afford food only with food stamps	(6) Person participates in more than one community or school event a year	(5) Child(ren) attends school regularly, and is failing no more than one class	(6) Child(ren) behaved inappropriately on occasion, but can be effectively addressed by an adult	(6) Child(ren) is on probation (5) Child is involved in the juvenile justice system but no criminal charges have been made	(6) Currently unaware of any chronic or physical condition in need of medical attention Access to medical care if needed
Vulnerable 3-4	(4) Family unable to afford food Uses a food bank and/or food stamps (3) Family unable to afford food, reliant upon others (family/friends) for food	(3) Person participates in one community or school event a year	(3) Child(ren) attends school regularly and is failing more than one class	(3) Child(ren) has behaved inappropriately at school, home, or in the community and the behavior is difficult to control	(3) Child(ren) is active in juvenile justice system and resides at home	(4) Chronic medical conditions, potentially life threatening, with inconsistent or no follow up with care (3) Chronic medical conditions(s), potentially life threatening, unwilling to follow up with care
In Crisis 0-2	(0) Family unable to afford food and does not use food bank or food stamps	(0) Person does not participate in any community or school event	(2) Child(ren) does not attend school regularly and is failing more than one class (1) Child(ren) is suspended from school (0) Child(ren) dropped out or expelled from school	(0) Child(ren) has behaved inappropriately at school, home or in the community and behavior is uncontrollable and/or violent	(0) Child(ren) is active in juvenile justice system and resides in a juvenile facility	(2) Inconsistent use of and/or limited access to health care (0) Untreated chronic medical, life threatening condition(s) with no follow up or access to care

Dimensions/ Benchmarks	Support System	Behavioral Health	Legal (Added to OSM)			
Thriving 9-10	(10) Has healthy/expanding support network, household is stable and communication is consistently open	(10) All family members are without mental health or addiction issues (9) Family member has maintained a regimen of care for a period of time exceeding 5 years	(10) Never arrested, no pending civil or motor vehicle legal issues			
Safe 7-8	(8) Strong support from family and friends Household members support each other's efforts (7) Consistent involvement in positive community programs and resources	(8) Family member maintains active regimen of care for a period greater than one year but less than 5 years (7) Family member maintains active regimen of care for a period less than one year	(8) All criminal legal issues resolved without criminal record or has legal representation case(s) moving towards resolution (7) All criminal legal issues resolved, has criminal record or has legal representation, case(s) moving towards resolution			
Stable 5-6	(6) Some support from family/friends, family members acknowledge and seek to change negative behaviors, are learning to communicate and support	(6) Family Member is currently in a residential or out-patient intensive treatment program	(6) With legal assistance, has or soon will initiate or respond to legal actions, is in court system (5) Has significant criminal record, but no current criminal charges/arrest pending			
Vulnerable 3-4	(4) Family/friends may be supportive, but lack ability or resources to help (3) Current support system is temporary, current support system is inadequate or detrimental	(4) Family member recognizes active addiction or mental health problem and is scheduled for treatment (3) Family member recognizes active addiction or mental health problem but is not scheduled for treatment	(4) Correctly identifies a problem as legal issue, knows what to do but lacks ability to proceed without legal and/or financial assistance (3) Has been arrested and received legal information/advice and correctly identifies the severity of the problem, may not know what to do next			
In-Crisis 0-2	(2) Has minimal supports through essential community/program involvement (0) Does not relate with others, introverted and/or secluded, without family or community supports	(0) Family member in active drug or alcohol addiction or mental health crisis and is unable to recognize problem or the need for intervention	(2) Has been arrested and does not know what to do next (0) Currently evading responsibility, warrant for arrest has been issued, likely incarceration in immediate future			

ATTACHMENT C
ROMA RESOURCE LINKS

Attachment C: CSBG Resources & Reference Links:

- National Association for State Community Services Program

  https.//nascsp.org/csbg/

  - See Data Collection and Reporting: CSBG Annual Report

    Module 4 Instruction Manual

    - https·//nascsp org/wp-content/uploads/2018/12/Module-4-Instruction-Manual_V2_12_7_18_F.pdf

    Instructional Notes – Module 4 – Individual and Family Level

    - https://nascsp.org/wp-content/uploads/2019/03/module4_f-numbered-4 pdf
      - Details Indicators, Services, Demographic Characteristics

    Instruction Manual

    - https://nascsp.org/wp-content/uploads/2018/12/Module-4-Instruction-Manual_V2_12_7_18_F pdf

- CSBG Annual Report Lexicon

  https://nascsp.org/csbg/csbg-data-collection-and-reporting/csbg-annual-report

ATTACHMENT D
BID FORM

AUTHORIZATION AND EXECUTION OF BID

1. The undersigned bidder, having fully informed themselves regarding the accuracy of the statements made herein, agrees to abide by the conditions set forth in the attached bid document, and certifies that:

   a. The propose bid has been presented by the bidder independently and has been submitted without collusion and without any agreement, understanding, or planned common course of action designed to limit independent bidding or competition, with any other vendor of materials, supplies, equipment or services described in the invitation to bid.

   b. The bidder has submitted this bid without collusion with CRT, any of its affiliated companies, or any employee thereof, and is unaware of any direct, personal pecuniary interest of any employee of CRT or any of its affiliated companies in the outcome of this bid.

   c. The bidder has not communicated the contents of the bid to its employees or agents to any person not an employee or agent of the bidder or its surety on any bond furnished with the bid, and will not be communicated to any such person prior to the official opening of the bid.

   d. The bidder has not been debarred, suspended or excluded from any publicly-funded projects or programs.

   e. The bidder has become familiar with and has agreed to comply with the terms and conditions of the specifications and all other contract documents and with all Federal, State and Local Laws, Ordinances or Regulations which in any manner relate to the furnishing of the equipment, material or services in accordance with the Contract.

2. The undersigned bidder further certifies that this statement is executed for the purpose of inducing the Community Renewal Team to consider the bid and make an award in accordance therewith.

3. Complete & Sign

Legal Name of Bidder	
Business Address	
Phone #	
Email	
Print Name & Title of Authorized Agent	
Signature	

ATTACHMENT E
QUOTE FORM

The quote submitted must encompass all design, development, software coding, validation, testing, administrator training and any software licensing (in addition to Salesforce Licensing) necessary for development and maintenance of the features and functions identified in this document.
Your proposal must list pricing for:

- All software development, modifications or updates necessary to meet requirements set forth in this document's **Scope of Work**
  - NOTE: Please break out pricing independently for each section contained within the scope of work.
- Any administrator training or knowledge transfer necessary for CRT IT Department to administer and support this system
- Addition of Third party tools, including but not limited to: address validation, automatic de-duplication, reporting, and data analysis/business intelligence.
- Ongoing technical support services (for reference purposes only)

Service	Cost
Software Platform	
Data Integrity & Application Security	
Reporting & Data Analysis	
Functional Improvements: Case Management	
Functional Improvements: Program Management	
Referral Tracking	
Organizational Efficiency	
STEPS Customer Standardization	

Stretch Goals	
Total	

Business Name	
Print Name & Title of Authorized Agent	
Signature	

Other requirements:

Within your submitted proposal, please include the following:

- Provide a company profile, length of time in business, number of years of experience with Salesforce and relevant core competencies. Include subcontractors who would be working directly on this project, however preference given to companies leveraging direct employees.
- Please identify and describe any special awards or recognition your company may have received from the Salesforce organization.
- Please identify and describe you company's influence within the Salesforce community.
- Provide up to date reference information for three (3) former or current clients. Include three (3) relevant projects your firm has produced that best reflect your work and relevancy to this project. Preferred references are organizations of similar size, scale and scope to CRT.
- Briefly list the role your firm played in each project. The URL should be submitted. Only sites that are live will qualify during evaluation.
- Describe your experience providing Salesforce specific software development/consulting services for not-for-profit and/or community-focused projects.
- Please discuss your development, testing, and implementation plan. Include your service level agreement structure, including: average response time, support hours, availability for on-site support or troubleshooting, average response time for bug fixes and enhancements post deployment.
- Time frame for project completion.
- Terms and conditions.

Community Renewal Team, Inc.
555 Windsor Street
Hartford, CT 06120

ATTACHMENT F
REFERENCE FORM

Contractor Name: ____

Reference #1:

Name of Company____
Contact Name: ____
Address:____
____
City/Town State Zip CodeTelephone

Description of work/project/products completed for or sold to this customer:

____
____
____
____

Reference #2:

Name of Company____
Contact Name: ____
Address:____
____
City/Town State Zip CodeTelephone

Description of work/project/products completed for or sold to this customer:

____
____
____

Reference #3:

Name of Company____
Contact Name: ____
Address:____
____
City/Town State Zip CodeTelephone

Description of work/project/products completed for or sold to this customer:

____
____
____
____

Community Renewal Team, Inc.
555 Windsor Street
Hartford, CT 06120

REQUEST FOR PROPOSAL DOCUMENT SUBMISSION CHECK LIST

Document Required	√
Bid Form (Attachment D)	
Quote Form (Attachment E)	
Reference Form (Attachment F)	
Sample COI (as outlined in on page 4 Indemnification and Insurance)	
Provide a company profile, length of time in business, number of years of experience with Salesforce and relevant core competencies. Include subcontractors who would be working directly on this project, however preference given to companies leveraging direct employees.	
Please identify and describe any special awards or recognition your company may have received from the Salesforce organization.	
Please identify and describe you company's influence within the Salesforce community.	
Provide up to date reference information for three (3) former or current clients. Include three (3) relevant projects your firm has produced that best reflect your work and relevancy to this project. Preferred references are organizations of similar size, scale and scope to CRT.	
Briefly list the role your firm played in each project. The URL should be submitted. Only sites that are live will qualify during evaluation.	
Describe your experience providing Salesforce specific software development/consulting services for not-for-profit and/or community-focused projects.	
Please discuss your development, testing, and implementation plan. Include your service level agreement structure, including: average response time, support hours, availability for on-site support or troubleshooting, average response time for bug fixes and enhancements post deployment.	
Time frame for project completion.	
Terms and conditions.	