

THE COMMUNITY AND
ASSOCIATION OF COOK



ECONOMIC DEVELOPMENT
COUNTY, INC.

Acknowledgement Receipt

To Be Returned with RFP

ADDENDUM I
Request for Proposals
Specification No. RFQ04282022

for

CEDA CRM and CASE MANAGEMENT
SOFTWARE AND IMPLEMENTATION SERVICES

The RFQ Due Date is Friday, June 3, 2022 at 3:00 P.M., C.S.T.

Company:
Contact Name:
Phone #:
Addendum Received by:
Date Addendum Received:
Signature:

Change:

Submissions are due by Friday, June 3, 2022 by 3:00PM

Questions and Answers:

1. How many users will access the system?

Answer:

CEDA expects 500 users to utilize the system. This may increase over time.

2. How many programs will be setup? Can you provide a description of these programs?

Answer:

Currently, we would like LIHEAP and Weatherization to be set up. These are described in the RFP

3. Do you have any specific reporting needs? If so, can you provide copies of these reports?

Answer: Yes the initial reporting requirements are laid out in the Business and Functional requirements doc. Suffice it to say, CEDA expects to report on any captured field in this system and would like to use a reporting/analytics platform for this (which should be part of your proposal).

4. Will there be a database conversion? If so, will you be able to provide the data in our staging table format?

Answer: These should be minimal database conversions (to be determined). We have Sharepoint and SQL server backends; however, it has not been decided what data (if any) will need conversion. In your proposal, you should propose data conversions in terms of the amount of data and how many estimated hours for converting data. We will make every attempt for MINIMAL data conversions.

5. Would you like any interfaces? If so, to what systems? What are the formats (csv, xml, excel, etc.)? Will they be uni-directional or bi-directional? Real time or batch? How many data fields will you share?

Answer: This is planned at a later date. Bi-directional. Ideally, down the road, CEDA would like to interface in a batch format with DCEO (State of Illinois) however this is not authorized by DCEO at this time so for this project NO interfaces will be required.

6. How many applicants will access the self-service portal?

Answer: 200,000 per year. Expected growth of 10 percent per year.

7. How many users will access the vendor-facing portal?

Answer: Our user base is 500 active users + partner sites (for intake), and our constituent base is 200,000.

8. Is there a budget identified for this project?

Answer: No defined budget. The RFP proposals will determine how much we can afford

9. In Section 2.1 Goals and Objectives - Portal available in multiple languages, including English, Spanish, and Arabic – will CEDA provide the translation?

Answer: No. Suggest you leverage web browser translation tools

10. In Section 3 Required Proposal Content - How will you support the launch of integrated social media and mobile applications – can you elaborate on the requirement for integrated social media, provide a use case?

Answer: We get messages and comments on social media and as replies to mass emails from clients with customer service needs. We are looking for a system that can aggregate messages from these different platforms and allow teams to collaborate on them.

The second part is that we'd love to be able to answer the most common questions we get to deflect away from the call center. Currently, we have to ask the Program (like LIHEAP or Weatherization) group to look into a client's application status and/or why they were denied. To solve this, Outreach would like to be able to see very limited information about the application status *or* be able to create a way for Outreach to transfer the client to the respective program group in an automated way as part of a workflow (ticket workflow).

11. In Section 3 Required Proposal Content states the Proposal must include the information outlined and in the same order as listed below for consistency and evaluation. In Section 8.2 the submission requirements are different than Section 3. Which format should we follow?

Answer: Section 3 should be followed, however, the supplemental items in sections 8.2.7 through 8.2.12 are required to be submitted as well.

12. Have you seen any vendor demos in the last 6 months? If so, which vendor demos have you seen?

Answer: Many vendors approach us. We have had a cursory look at vendors that are in the CRM space and are aware of the big players – Microsoft, Salesforce, Oracle, SAP.

13. If your RFP timeline pushes, does your timeline for implementation also push back or is there a reason for the December 15, 2022 deadline for Phase 1 (LIHEAP and IWHAP)?

Answer: We really would like the LIHEAP portion of the system ready by 12/15/2022. We realize it may not be possible and no vendor will be looked at adversely. We wanted to make sure everyone understood our seasonality. The reason for this is because LIHEAP is about Utility bill assistance (heating/electricity) and those are needed in the winter months.

14. What is the file size limit for an electronic submission?

Answer: 40 MB limit inbound

15. Can the proposal be submitted in multiple emails (maximum of 3) as a workaround to the size limit of a single email?

Answer: Yes, the email subject line should state what part it is (ex. Part 1 of 3).

16. Does CEDA have an intended length of time to allot for each vendor demo?

Answer: initial round will be one hour, the subsequent (shortlist) round will be 2.5 hours

17. **Question:** Please provide an estimate of user count by user category

Answer: 500 active users + Preferably unlimited intake (data entry) users.

18. **Question:** Thank you so much for your time today. Really great information shared and we're excited for the opportunity to work together. I just wanted to follow up on my question about the 500 concurrent licenses. Zendesk has 3 main types of users:

- **Agents** are users who need to communicate directly with your constituents and need to update fields within the system. Full agents are priced per user, not concurrently.
- **Light Agents** can add internal notes to tickets and have read-only access to ticket and customer data. These are great for anyone who needs visibility into conversations or might need to provide approvals, additional information, expertise, etc. in an internal capacity. These users are included! Depending on the plan level you would select, you would have between 50-1000 light agents available for you to use as you'd like.
- **End users** are anyone who is reaching out with an inquiry for CEDA. They do not have access to the back-end ticketing system but can have access to the knowledge base and user portal. Even better: there is no limit or charge for end-users.

Answer: 400 Agents + at least 100 light agents+ unlimited end users

19. **Question:** Are you still looking at 500 agents, or would a portion of these users be considered light agents? It would be very helpful to know the breakdown between these types of users, even if it is just a rough estimate, so we can give you the most accurate pricing proposal.

Answer: 400 Agents + at least 100 light agents+ unlimited end users

20. Can companies from outside the USA apply for this project?

Answer: yes

21. Will we be having team meetings in your office?

Answer: not necessary, they can be virtual.

22. Can the task be performed remotely (ex. India or Canada)?

Answer: Potentially, yes, if this is your business model and there are cost savings.

23. Please define the required integrations for phase 1 & 2 of this project.

Answer: At this time no integration is required, integration is a future project

24. Please identify all data migration requirements from current systems to the new system for Phase 1 & 2.

Answer: The current system in phase 1 and 2 are Sharepoint and SQL backends. We expect minimal data migration except for Weatherization work orders

25. Please provide a description of the sizes and if data dictionaries are available.

Answer: Across all sharepoint sites we can estimate a maximum of 5 TB.

26. Please provide a use case or example for this question

PH1/REQ60 1 Ability to attach uploads to a record in several touchpoint spread across weeks and months All Programs

Answer: “I want to upload my income information today. However, my electric bill, hasn’t arrived in the mail so I may upload this electric bill at a later date”. Also, the customer may forget to upload all required documents initially and may be prompted by CEDA personnel to upload additional documents (i.e. copy of a driver’s license) at a later date.

27. Are these languages required for Phase 1? If not, please define which ones are? Same questions for Phase 2.

PH2/REQ71 2 Ability to switch externally- facing portal to Spanish, Arabic, Polish, Chinese, and Hindi Client Relationship

These are all Phase 2.

28. Are there any data migration requirements to the new CRM/Case Management System?

Answer: The current system are Sharepoint and SQL backends. We expect minimal data migration except for Weatherization work orders.

29. What is the system version/revision on the call center system that you would like the new system to integrate with?

Answer: None. We anticipate this new system will be the system of record for our call center.

30. Do you have a GIS system as part of your IT infrastructure? If not, please confirm that for location the required integration is only with Google maps.

Answer: We do have GIS (ArGIS); however our hope is to integrate only with Google maps. At a later phase we would like to do analytics with ArcGIS,

31. You indicate that the maintenance agreement will not commence until the new system is in Production, however, most software vendors cloud subscriptions which include software license, cloud access, support and updates) begin upon first use. Please clarify if the maintenance agreement here specifically refers to CRM/Case Management Application.

Answer: Yes, the maintenance is specific to the CRM/Case Management application and not the licensing.

32. The Project Manager, System Administrator and/or Developer are to become CEDA resources upon completion of this implementation. Please comment on this requirement, if they will actually transition to become CEDA employees or they remain under vendor’s employment but are dedicated to CEDA? Related to this will they be expected to move to Cook County, IL or can they be remote?

Answer: The hope is that these resources continue to work with the vendor only for implementation.

CEDA will subsequently hire different resources to support the application who will be CEDA employees.

These would not be the same resources, but initially, for the implementation, we are requesting the vendor incorporate these resources in their proposal

33. Do you have any organizational process documentation that can be shared (such as, Process flow Documents of existing process, Future State Diagrams, data model, Infrastructure or deployment/architecture diagrams or documents, etc.)?

Answer: These were provided in the solicitation

34. How many users will be using the system for more than 50 hours/month? How many between 10 and 50 hours per month? And how many are sporadic users using it for less than 10 hours per month?

Answer: 400 users for 50 hours or more per month, 100 for 10-50 hours, and unlimited sporadic users/clients

35. For the sake of clarity please list all the existing and future Applications that the new System must support or integrate with?

Answer: Currently no integrations are required. Future integrations could be with the State of Illinois's LIHEAP, Weatherworks, etc. currently run by the state of Illinois/DCEO.

36. Will you accept a framework where the project is managed and delivered by a team based in the US which is supported by other team members who may be outside the US?

Answer: Yes

37. Do you have a predefined budget for the Solution and, if so, can a budget or range be shared?

Answer: No predefined budget at this stage.

38. Are comparable references with public sector entities outside the US or Canada acceptable?

Answer: Yes, but please keep in mind CEDA is not a public sector entity.

39. Have you received vendors, seen presentations or proof of concept related to the requirements of this RFP in the last 18 months? If yes, can you please share the details?

Answer: Yes, we have been in discussions with other community action agencies regarding their experiences. Many vendors approach us. We have had a cursory look at vendors that are in the CRM space but have not completed any in-depth analysis and are aware of the big players – Microsoft, Salesforce, Oracle, SAP. We are using the RFP process to learn of the functionality / capabilities of different systems.

40. Are you open to a vendor proposing a solution to build your application, screen and flows listed in Exhibit-X using their Proprietary and proven tools and product suite?

For your understanding we have suites of products and tools that we are using to build product/projects for Case Managements, Fraud Detection, Licensing Management system used by 40+ private and government clients. It includes but not limited to Protean Forms (Design screen/Forms with low/no code), Workflow Engine, e-Security, PresentTense (Create quick Search/Dashboard/Queues/Export), PHEME (Analytics/Adhoc Reporting/Data Export) etc. This will provide you flexibility, scalability and will be cost effective in meeting your current and long-

term business needs.

Are you open to such solution or only looking for off-the-self solution with in-built application and flows as per your business requirement? Primarily vendors with product in same domain.

Answer: Yes we are open, however we favor low code/no code development. Any proprietary development is cause for concern for us in terms of support.

41. Related to Question-1: Are you looking for CRM's such as "Salesforce" for the implementation or open to recommendation as explained in question-1?

Answer: We are open to recommendations. We highly suggest low code/no code. We are aware of Salesforce and other CRM capabilities. We are looking for a platform to continue refining our system as this will become the centralized system for the agency.

42. *From RFP - "Portal features need to be available via desktop and mobile, including the ability for clients to upload mobile phone pictures of their documents".*

Is there a need for internal staff to access application using mobile phones or it is limited to client portals?

Answer: limited to client portals.

43. *From RFP - "Allow external partners (i.e., Vendors, Partner Intake Sites, Call Center) to easily enter and update client data securely as well as exchange documentation with CEDA Staff".*

Can you please elaborate application access by external partners and what kind of operations they will be performing in the application?

Answer: Our external partners (our partner intake sites and our call center along with the clients themselves) will be uploading PII data for constituents.

44. *From RFP - "Support the launch of integrated social media" and "Allow Outreach staff to see application status and next steps, so they can provide world-class customer support via social media and other digital avenues".*

Please elaborate what type of automation/integration expected with social media application and your current processes.

Answer: We get messages and comments on social media and as replies to mass emails from clients with customer service needs. We are looking for a system that can aggregate messages from these different platforms and allow teams to collaborate on them.

The second part is that we'd love to be able to answer the most common questions we get to deflect away from the call center. Currently, we have to ask the Program group to look into a client's application status and/or why they were denied. To solve this, Outreach would like to be able to see very limited information about the application status or be able to create a way for Outreach to transfer the client to the respective program in an automated way as part of a workflow.

45. Ability to pin alert messages to the top of the portal, so CEDA can provide one-to-many messaging about issues that may drive high contact volume – Does this indicate emailing to multiple parties from within the system?

Answer: Yes

46. Incorporating a plug in, will allow partners and, or clients to submit request for referral services to other CEDA programs as well as other community action agency services to help the customer qualify for aid - What is this plugin? Plugin for which ecosystem does this refer to?

Answer: Please ignore. This is handled differently

47. Data Migration: Please elaborate the requirement and expectation for data migration.

Answer: There is minimal expectation for data migration. We anticipate perhaps importing client lists and perhaps some of the weatherization data

48. In case of on-premises deployment (in future), is CEDA expecting to own the code or looking software with license for 500+ users?

Answer: Looking for the software. We do not intend to own the code.

49. We do understand that you are working on tight timelines. Is there a possibility to get extension on submission date by a week or so?

Answer: Yes. We have incorporated this.

50. Please provide number of licensed users by each type of Role including:

- a. Case Workers
- B. Social Workers
- c. Provider/Community Based Organization (CCA) Users that deliver Services on your behalf
- d. Admin users
- e. CEDA Employees
- f. Approved Contractors (affiliates)

Answer: We have not broken this down. We have a total of 500 CEDA employees, which include the above mentioned roles. The Provider/Community based organization users are what we call “partner intake sites” and can be found here (although not complete and each site may have many users – you should estimate 4-5 users per site)- <https://tubr.cedaorg.net/public/laa/v2>

51. We learned from the pre-proposal conference that Clients submit applications via a portal. Please provide estimated number of clients and how often would each client log into the system per month. This will help us create the appropriate license model.

Answer: This can be upwards of 200K customers.

52. We learned from the pre-proposal conference that 80 partners such as churches provide services where clients come in to submit applications. Please provide estimated number of users that access the system at these partner locations.

Answer: Estimate vary (2-3 in some sites and others have 10-12). Total partner users in year 2022 was 425 across all sites. Next year the number will be up by 15-20%. So estimate 500 users at the partner intake sites (non-CEDA). This may grow over time.

53. We learned from the pre-proposal conference that 200,000 applications are completed each year. Please confirm.

Answer: Confirmed

54. Is CEDA looking for CTI Integration and Call Center support within the solution?

Answer: Not as part of this project. Possibility of future integration

55. Is the expectation that customers be able to self-register for the portal, or do they need to be invited to register?

Answer: Both self-register and be invited to register. Some customers need help others can do it themselves.

56. What type(s) of device(s) are used to complete the Home Verification process?

Answer: Tablets, laptops

57. Does CEDA have any BI reporting / analytics tools available? If so, can details be provided? Is the expectation that these tools are used for reporting or is CEDA open to other solution capabilities?

Answer: CEDA is requesting a recommendation and implementation of the BI/analytics tools as part of this project. CEDA does not have such a tool.

58. Does CEDA have any existing ESB/ETL or integration tools?

Answer: No

59. Is there an expectation to integrate with payment systems (i.e., SAP)? Please provide details on the Intake Site Payment requirement.

Answer: No. This would be at a later phase and not part of the exiting SOW

60. What is the process for determining eligibility? Is the expectation that this be system-driven (i.e., based on a rules engine), user-driven, or both?

Answer: Both. It will initially be user-driven; however CEDA would be interested in incorporating a rules and a workflow engine.

61. Will Vendors receive an acknowledgement of receipt of the proposal via the sender's email?

Answer: They should. You are welcome to confirm with Shawnee Little if you do not receive an acknowledgment. She controls the procurement process for CEDA.

62. Are you looking for Call Center functionality to be included in the RFP response to aid in your current programs?

Answer: Not as part of this project.

63. With vendor relations, do you need to be able to track contract management in the system or does this live in a different system?

Answer: It should be tracked in this system.

64. Do you need to have vendors sign contracts with information pulled from the database?

Answer: yes

65. Is a document generation tool needed?

Answer: yes

66. Is a document storage/management tool needed?

Answer: yes

67. Is CEDA open to a proposal that extends beyond 12/15/22 goal for initial 'go-live' of Phase 1 of the system?

Answer: yes. Will be discussed with selected vendor.

68. If a phased implementation approach is acceptable for LIEHAP and Weatherization Programs to go-live beyond 12/15/22, what is the desired order for which CEDA Programs are to be implemented?

Answer: LIHEAP first, then Weatherization.

69. Can bidders assume that the mobile devices portable tablets for CEDA staff and internet connectivity will be supplied by CEDA?

Answer: Yes

70. What costs has CEDA incurred for the initial set up, ongoing maintenance, hosting, software licensing, support, and enhancements (i.e., "change orders") over the lifetime of the current system(s) to be replaced by the new solution?

Answer: CEDA has homegrown sharepoint apps that have been used over the years. It does not have an existing centralized system.

71. What presentations, software demonstrations and/or estimates / quotes has CEDA received related to the CRM and Case Management project, and from whom?

Answer: Many vendors approach us. We have had a cursory look at vendors that are in the CRM space but have not completed any in-depth analysis and are aware of the big players – Microsoft, Salesforce, Oracle, SAP. We are only aware of published pricing.

72. For data conversion requirements, please inventory all data sources, file formats, and size of the current data sets to be converted and migrated into the new Licensing System.

Answer: there will be minimal data conversion. CEDA anticipates there will be some, but will discuss with selected vendor

73. What is CEDA's budget for the new solution and what does the budget intend to cover?

Answer: CEDA is looking for RFP responses. CEDA does not have a detailed budget for this project at this time. We will work with the selected vendor in detail on this, as needed.

74. What has CEDA budgeted for the initial system implementation, as well as ongoing support, maintenance, and support?

Answer: CEDA is looking for RFP responses. CEDA will not disclose its budget for this project at this time. We will work with the selected vendor on this.

75. What, if any, amount of the budget is subject to expire by a certain timeframe and when? Please elaborate.

Answer: CEDA is looking for RFP responses. CEDA will not disclose its budget for this project at this time. We will work with the selected vendor on this.

76. Please provide an approximate number of standard email/letter templates that will be used by CEDA that are to be integrated and automated by the system.

Answer: 20

77. How many different or distinct application and inspection types will be supported in this solution? Please provide a comprehensive list.

Answer: Unknown at this time. CEDA intends to grow with this system.

78. Please identify ALL other systems that the new solution will need to integrate with (i.e. payment processor, other systems such as financial, etc.) along with an inventory of which interfaces will need to be wither a one-way (import or export) or two-way data exchange?

Answer: Unknown at this time. CEDA intends to grow with this system. These will be addressed in later phases

79. Please provide the average number of applications and cases processed by CEDA annually?

Answer: 200,000 + 10% growth

80. Is CEDA expecting the vendor to incorporate a payment processor within the proposal, or provide recommendations?

Answer: At a later phase. Not as part of this SOW

81. Please breakdown CEDA employee and partner users that will be using the new CRM and Case Management system by entity / intake site (i.e., CEDA, municipalities, churches, etc.) end role.

Answer: 500 CEDA employees + approximately 500 users at the partner intake sites

82. Which vendors attended the pre-proposal conference?

Answer: CEDA does not disclose details of this nature. This is an open solicitation meaning anyone is welcome to participate.

83. Is it safe to assume that Outreach and CSR (reviewing and tracking application status, etc.) staff's social media interactions would be outside of the new system (not requiring an actual

interface to social media platforms), however the ability to denote those interactions within the system is required? Please elaborate.

Answer: Yes. The interaction with social media platforms should be left strictly with the program group and under their authority. Our Outreach/Marketing group cannot automatically solicit contact information from the funder (the Program group) without consent from them. If the program group wishes to solicit and leverage social media, the program group initiates the request to the Outreach group.

84. Will selected vendor have the opportunity to provide exceptions and/or alternative contract language during contract negotiations, or will vendors need to provide those within their respective proposals?

Answer: The selected vendor will have the opportunity to provide exceptions. Vendors will also need to provide those.

85. Can CEDA provide an inventory of all the reports that need to be replicated within the new system?

Answer: Unfortunately no, since this will be a new endeavor for CEDA.

86. How many specific reports will need to be developed per Program, or is CEDA open to leveraging the new solution's ad-hoc reporting capabilities to fulfill data reporting needs?

Answer: Open to leveraging ad-hoc reporting. An analytics/reporting engine is highly encouraged.

87. Given the solution will be web based, is it acceptable to leverage web browsers' ability to translate and display text in the end user's preferred, selected language?

Answer: Yes!

88. Please identify all existing systems' (stakeholder) data format and size that will need to be converted into the new CRM and Case Management solution.

Answer: We have several SharePoint with backend SQL apps that are homegrown. We wish to migrate minimal data and perhaps utilize an import function for pertinent data that may be useful in the new system. We are not averse to starting from scratch except for some instances.

89. Regarding the assumption "A recommended BI tool *with licensing* for report creation" – is CEDA looking for tool recommendation (i.e., Tableau, etc.), or both a recommendation AND licensing costs that would be included in the proposal? Please clarify as there may be more advantageous options for CEDA to explore / purchase BI tool(s) directly at a discount.

Answer: Both the tool, licensing costs, recommendations. If these tools are available at cheaper options, CEDA will consider these, but would like the CRM vendor to recommend the appropriate tools.