UPO Customer Data Tracking & Case Management System
RFP#2019-01
QUESTIONS & ANSWERS - Final

Question #1:
How many individual members of UPO staff will need to access the system to record data or information?

Answer #1:
Approximately 200 UPO staff and 100 staff of UPO's Funded Service Providers will need to access the system in any given fiscal year.

Question #2:
How many partners (individual members of outside organizations) will need access to the system to record data or information?

Answer #2:
Approximately 10 CSBG Partners and 10 Headstart Partners in any given fiscal year.

Question #3:
What type of integration is needed between the case management system and Prophix? Does information only need to go in one direction, e.g. from Prophix to case management system? Does information need to go both directions (to and from each system)? How often must data be shared from one system to the other; in real time, nightly, weekly, and monthly?

Answer #3:
One direction will be sufficient. It is desired that Prophix reports pull aggregate programmatic key performance indicators in real-time to support UPO's internal Performance Management Report that uses dashboards in Prophix to cross-reference programmatic performance with financial and human resource information about each program.

Question #4:
Does UPO have staff designated to perform system administration activities, such as making updates to forms, configuration changes to reports and adding users to their system?

Answer #4:
Yes.

Question #5:
Does UPO have staff that will be designated as "power users" or staff that will take additional training in the use and configuration of the case management system?

Answer #5:
Yes.

Question #6:
Does UPO intend to replace more than the CASA system?

Answer #6:
Yes. CASA and ChildPlus

Question #7:
 Is UPO a State Funded Eligible Entity? Who is the State CSBG Agency?

Answer #7:
UPO receives federal and state funds. The State CSBG Agency is the DC Department of Human Services.

ISSUED ON 4/10/2019

Question #8:
Please provide details about the # of forms and type of data Funded Service Providers will need access to for recording data in the case management system.

Answer #8:
Funded Service Providers will use the system just like UPO staff do – to records customer profiles, to records services delivered, to record outcomes achieved and to retrieve reports.

Question #9:
Please confirm import/ export capabilities sufficiently meet the need of the requested integration with Prophix.

Answer #9:
UPO wants to know what options the proposed solution has in terms of integrating with other systems, through API's or direct access to the database for example, or import/exports (XML, JSON, Excel, PDF, etc.).

Question #10:
Has UPO worked with a specific vendor leading up to the release of this RFP, to assist in shaping the requirements of the RFP? If so, who is that vendor?

Answer #10:
No. UPO gathered information and requirements by interviewing its staff and partners.

Question #11:
Please provide a list of internal and external attendees of the Informational webinar held on 4/3/2019.

Answer #11:
A complete list is not currently available.

Question #12:
What is UPO's implementation timeline or when does UPO need to be "live" with a new system?

Answer #12:
No fixed timeline has been determined for the go-live date. Vendors who are able to go live sooner will be evaluated on the merits of the system relative to requirements.

Question #13:
How many integrations with third-party applications are required for the implementation and what type of integrations (one-way vs. two-way, real-time vs. batch, etc.)?

Answer #13:
Two-way integration is desired with Prophix. No other immediate integration is required although UPO desires a system that provides clear API that will guide future decisions about integration.

Question #14:
Can UPO provide more details regarding the NPI reports requirement?

Answer #14:
For more details, refer to the CSBG Annual Report (Appendix B) and the HeadStart PIR (Appendix C). Additional insight is available at https://www.acf.hhs.gov/ohs and at https://nascsp.org/csbg/csbg-data-collection-and-reporting/csbg-annual-report/

Question #15:
The "Registrar Functionality" requirements indicate that UPO may be looking for a solution that serves as an LMS (learning management system); how important is it to UPO for the selected solution to have standard LMS capabilities? Is this a requirement, a priority, or is this a luxury or "nice-to-have" requirement?

Answer #15:
Yes, this feature is important to UPO and a priority.

Question #16:
For the 12 font requirement, is it okay for certain proposal headers to be a larger size font while the majority of the proposal is 12 font?

Answer #16:
Yes, it is okay and acceptable.

Question #17:
Regarding the structure of the proposal, and specifically, the technical proposal, the RFP can be interpreted to require that the documents in parentheses (**RFP Cover Page, Vendor ID Form, Business License, Insurance Certificate, and References**) are provided first before the Technical Proposal, which then has a Table of Contents Section. Would it be okay for those documents in parentheses to be provided as appendices or attachments to the technical proposal instead so that the proposal starts with the technical proposal (with the TOC near the beginning of the proposal)?

Answer #17:
Yes, it is okay and acceptable to provide the required documents as attachments to the technical proposal, as long as all the documents are provided and appropriately cross-referenced on the Table of Contents.

Question #18:
On page 14 of the RFP, the first bullet point for **h) Training, Warranty, Maintenance & Support Option(s)**, states: *Provide a complete maintenance plan and warranty plan as part of the proposal, including all options available for extended coverage and full pricing details for each level of coverage.* That would seem to contradict the instruction to keep pricing separate from the technical proposal. Please advise.

Answer #18:
Yes, pricing has to be kept separate. No pricing information needs to be provided in the Technical Proposal. Indicate what optional features are available at an additional charge, if any. All pricing information (summary and details) shall be provided in the Pricing Proposal only.

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Question #19:
What is the projected go-live date?

Answer #19:
This is the date that UPO wants staff to begin to use the solution. No fixed timeline has been determined. Vendors who are able to go live sooner will be evaluated on the merits of the system proposed relative to requirements.

Question #20:
What is the budget amount proposed for this solution?

Answer #20:
There is no preset dollar amount. Each proposal received will be given a fair evaluation on the basis of technical features it provides. Pricing proposals of only the technically qualified proposers will be evaluated.

Question #21:
What are all of the interfaces to third party system modules required?

Answer #21:
UPO is growing and pursuing integration between its finance systems, HR systems and programmatic systems. As of today, the systems are Microsoft Dynamics, Prophix, ADP/HRIS. UPO does not require the proposed system to have been already integrated into these systems but to have an API that makes the portability of data possible.

Question #22:
How are accounts managed? Which accounts?

Answer #22:
This feature refers to user accounts and administrator accounts.

This question is referring to users of the system and the reality that depending on the user access level assigned, one user will be able to access information that another user should not be able to access.

Question #23:
How are groups and permissions managed? Which groups?

Answer #23:
This feature refers to groups of customers, or cohorts of customers.

When all members or a group, or class or cohort receive the same service or achieve the same outcome, does the system provide an efficient way to record the information in a way that accurately updates the profile of individual users as well? Also, if a smaller subset of customers receive a service or achieve an outcome on a specific date, does the system provide an efficient way to indicate the nuanced information without staff having to pull up each individuals profile separately?

Question #24:
Does the system support distance (on-line) learning? What type of learning

Answer #24:
UPO provides vocational skills training on-site to numerous customers.

Some of our customers need to know if some of the courses can be taken remotely. The feature above is asking whether the proposed system is designed to permit instructors to offer a course online and to get enrolled accordingly.