

Arrive Utah  
21 E 100 N Suite 102  
American Fork, UT 84003

Request for Proposal  
For AU Database and Analysis Tool

**RFP Response Due:** June 14<sup>th</sup>, 2019 at 5PM MDT.

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This document contains instructions and information to be used by the Supplier when responding to Arrive Utah's Request for Proposal (RFP).

## Project Overview

Arrive Utah leads the region in supporting Utah's network of the Circles initiative and partners focused on long-term poverty reduction. Arrive Utah is seeking a 3-year contract for a technology platform capable of enabling Arrive Utah on multiple levels (internally and externally) to measure and understand the success of poverty reduction work in Utah. Locally and across the state.

## RFP Terms and Conditions

- All information in the RFP is provided to the Supplier in the strictest confidence and may not be disclosed to third parties without prior permission from Arrive Utah.
- All costs for preparing and submitting this RFP are the responsibility of the Supplier. Arrive Utah will not be liable for any costs incurred by the supplier in preparing and/or submitting a proposal, in conduct of an interview, or any other activities related to responding to this RFP, whether the Supplier is selected or not.
- All proposals must be submitted in English.
- All offers should remain valid for a minimum of 3 months from the date of submission.
- Arrive Utah reserves the right to reject any or all proposals without penalty and makes no commitment to the effect that the RFP process will result in a business transaction with one or more Suppliers.
- Arrive Utah reserves the right to amend or cancel this RFP without liability prior to the execution of a contractual agreement with any prospective Supplier. In this event, Arrive Utah will notify all prospective Suppliers as appropriate.
- If you have questions or need clarifications on the RFP, please email [britanee@arriveutah.org](mailto:britanee@arriveutah.org) by Tuesday June 11<sup>th</sup>. We will respond within 2 business days.
- If you would like copies of answers to inquiries from other suppliers, please send an email to [britanee@arriveutah.org](mailto:britanee@arriveutah.org), with subject line <<Intent to Submit>>, & include name and email for person who would like to receive information.
- Arrive Utah believes in transparency and has a budget of \$65,000 total to include set-up, annual costs, and usage for three year contract. With this transparency, Arrive Utah expects competitive bids to accurately reflect the functionality requirements in a cost-effective way.
- Arrive Utah is a private nonprofit, and therefore, this RFP is not for a governmental organization and is not held to the same obligations government entities are.

## Timeline

We have included a list of key dates for this RFP in the following table. Note that any RFP responses received after the submission deadline will not be accepted. The following schedule is subject to change at Arrive Utah's discretion.

Key Event	Deadline
RFP issued to vendors	Tuesday, May 28 <sup>th</sup> , 2019
Deadline for vendors to ask questions	Tuesday, June 11 <sup>th</sup> , 2019
Arrive Utah responds to questions	Within 2 business days
RFP responses due Email responses to britanee@arriveutah.org	Friday, June 14 <sup>th</sup> , 2019; 3pm MST
Finalists' phone interviews	June 18 <sup>th</sup> – 20 <sup>th</sup> , 2019
Decision & notification	Last week of June

## Evaluation Criteria and Scoring

Arrive Utah will evaluate and score proposals based on the following criteria:

Criteria	Score
Team & Past Performance	19
Technical Capabilities	49
Implementation	29
Pricing & Contracting	45
Total	142 Points

## Organization Background

### Mission

Arrive Utah's mission is to unite Utahns to ensure each individual and family in our communities thrive. We unite and encourage all Utahns dedicated to eliminating poverty in our Utah communities to share their voice and create a paradigm shift in poverty services. Arrive Utah leads the Circles Initiative expansion in Utah and provides training and education on high-impact, long-term poverty reduction strategies to Utah communities committed to this work.

### Description

Arrive Utah is young in its development of only 3 years, and is a DBA under Community Action Services and Foodbank, a 501C3. Arrive Utah will be securing its own 501C3 status by 2021.

Originally, Arrive Utah focused on creating a statewide Circles network to quicken expansion and shorten the learning-curve of new Circles Chapters in Utah. Arrive Utah acknowledges multiple models of poverty reduction that are beneficial and is expanding its services to any community partner providing, or interested in creating, high-impact poverty reduction systems.

## Objectives

- Through selecting a Supplier, Arrive Utah seeks to utilize and customize an existing data and analysis tool/platform in order to:
  - aggregate and maintain a statewide collection of data on strategies helping families living in poverty to become financially stable
  - collect data on its relationship with the network of community partners providing poverty reduction support
    - data including the frequency, methods of interactions, and engagement levels of community partners
  - collect data on their rural Poverty Reduction Lab project
  - track strategic goals and actions of Arrive Utah

If this project is successful, the resulting database will enable Arrive Utah to understand the impact of the Circles Initiative and best practices for the Poverty Reduction Network in Utah going forward. These findings will be used to inform key stakeholders and decision-makers, prioritize resources, and improve outcomes of the Arrive Utah Network. Arrive Utah desires to move toward predictive models of current strategies and efforts-- having access to real-time data is a high priority. Arrive Utah also wants to evaluate and improve relationships with our network and improve the technical assistance given to these partners and members.

## Current State

Currently, Arrive Utah does not have an internal database or analysis tool. Arrive Utah uses Excel and Google Sheets to analyze and organize data received from the Circles Chapters/ Departments as needed. Using Excel and Google Sheets can be challenging for the Arrive Team when Arrive Utah must interpret or format data received from the six Circles Chapters to look the same in a table and report.

In creating a collective database and utilizing more sophisticated analysis tools, we hope to truly move toward a more data-driven method of decision making and new recommendations for improvements to services. These shifts in our work will help us stay more aligned to organization and desired mission outcomes and more efficient use of resources.

## Project Scope

The scope of work and expectations for the development of the database is outlined as follows:

- The Supplier will provide a demo as a sample, if possible; may use function of remote control of computer to see Supplier's screen if necessary
- The Supplier will adhere to security standards, HIPAA, best practices, and current policies in corresponding with Arrive Utah, as well as customizing database tool for Arrive Utah;
- The Supplier will recommend and document project phases;
- The Supplier will lead a complete walk-through or demonstration of database system with the staff of Arrive Utah to ensure smooth transition and ongoing supportability;
- The management of the database and analysis tool should be maintained by Arrive Utah;
- The Supplier will adapt or customize an approach that will best meet the needs of Arrive Utah;
- The Supplier's database and analysis tool will be able to achieve all the required technical capabilities listed in the Required Technical Capabilities section of this RFP. If unable to achieve the technical capabilities listed, the Supplier will be able to show a comparable alternative.
- The Supplier will contract with Arrive Utah for a minimum of three years;

## Required Technical Capabilities

Arrive Utah is ideally looking for a database and analysis tool that has the following technical capabilities:

### Platform

- Solution must allow Arrive Utah to administer their own projects/surveys without assistance from the Supplier and make changes to projects/surveys at no additional cost.
- Solution should allow for Arrive Utah to have control over user administration.
- Platform should:
  - be completely online and require no downloads or installations.
  - support all major web browsers, including Internet Explorer, Firefox, Chrome and Safari.
  - support Captcha verification tests within the survey to distinguish humans and computers and avoid spam.
  - allow user permissions to be enabled or disabled on an individual account level.
  - offer custom, organization-based libraries that can exist exclusively within the organization.

- allow surveys, messages, and libraries to be collaborated or shared with other users.
- distribute surveys through use of desktop computer and laptop
- allow survey ownership to be transferred to other user accounts when individuals leave the organization.
- support users to have different user permissions.
- support users to have multiple dashboards.
- support a minimum of 15 users, 3 of which are administrative users.
- allow user information inputted to be secure from other departments (Circles Chapters).
- have option of adding more dashboards in the future, and Supplier should outline additional costs (if any) in their budget.
- not be at risk for hacking or unauthorized viewing/usage of the data inputted.
- not utilize Arrive Utah's, or the Circles networks' data, for any reason.
- Arrive Utah should be able to export dashboards, results, and surveys to various formats (Adobe Acrobat, Word, Excel). For survey downloads, should include questions, choices, and logic.
- Platform has capability for Arrive Utah to retrieve inputted data if Supplier-Arrive Utah relationship terminates, within 30 days.

### Survey Design

- Survey look-and-feel must be customizable to match Arrive Utah branding and Circles branding.
- Platform should keep a history of survey versions during the build process.
- Surveys in the platform should:
  - be able to make questions mandatory for the respondent to answer.
  - be able to offer prompts to the respondent to answer seen but unanswered questions without requiring a response.
  - support text/graphic items that can be displayed in the survey but require no response from the respondent.
  - support highlighting text in a question.
  - allow font sizes, styles, colors, and formatting to be changed in one place and applied throughout the survey.
  - offer a progress bar to indicate the respondent progress in the survey.
  - allow respondents to save their progress and finish the survey where they left off later.
  - have skip logic capabilities to skip respondents over irrelevant questions.
  - have branch logic capabilities to branch respondents down different survey paths.
  - have logic based from survey questions and saved respondent data.
  - handle real-time changes and updates to surveys.

- offer a built-in table of contents for surveys that allows respondents to jump to different sections of the survey.
- restrict respondents from completing the survey multiple times.
- allow survey responses to be edited, tagged, or the survey to be retaken.
- have a built-in survey approval process that requires surveys to be previewed and approved before distribution.
- allow for existing surveys or survey questions to be copied and reused in other surveys.
- be fully customizable in terms of question types and content, with predefined rating scales available.
- Survey design should support:
  - multiple choice question types for surveys
  - long & short answer questions for surveys
  - Likert scale question types for surveys
  - ranking question types for surveys
- Multiple choice question types should:
  - support both single answer and multiple answer options.
  - be customizable to format vertically, horizontally, in columns, or in a dropdown menu.
  - allow formatting to have choices mutually exclusive when using a multiple select option (e.g. None of the above).
  - allow open ended text boxes to be added to choices within a question (e.g. Other - please specify).

## Analytics

- Results should be available in real-time.
- Role-based dashboards should be available with ability to restrict access based on user type.
- Dashboards should be customizable.
- Available analysis tools should include: driver analysis, text analytics (including sentiment).
- The platform's reporting interface should be easy to use with point-and-click and drag-and-drop capabilities.
- Reports should be customizable using any color scheme, various font styles and sizes, and custom logos and images.
- Tables and charts should be fully customizable with sizing, colors, fonts, axis, scales, and display settings.
- Individual charts and tables should be downloadable without downloading entire report.
- The tables should be formatted like Excel with the ability to run custom calculations.
- Filters should be based from survey questions, saved respondent data, data ranges, and completion status.
- Reports should be exported to Word, Excel, and PDF formats.

- Survey data should be downloaded as a .csv file format for compatibility with Excel, Access, and similar programs.
- Data streams must be able to be integrated from different sources into the feedback platform.
- Survey data should be able to import from Excel, Access, and Google Sheets (to push data manually).
- The platform's analysis capabilities should:
  - provide built-in reporting and analytics capabilities.
  - provide a standard report for easy data consumption.
  - allow for surveys to be built and viewed while the survey is actively collecting responses to give real-time insights.
  - report on survey responses still in progress.
  - offer individual response summaries and reports.
  - offer a template manager that can create color and formatting templates and apply them to desired reports.
  - support the standard pie charts, bar charts, line charts, and spline charts.
  - support both horizontal and vertical views of bar charts.
  - support both stacked and separated bar charts.
  - support plot charts and regression plot charts.
  - support gauge charts and half gauge charts.
  - support composite bar charts.
  - report on basic statistics of survey questions (e.g. mean, variance, standard deviation, etc.)
  - provide built-in pivot table functionality.
  - provide built-in cross tabulation functionality.
  - perform statistical testing via t-tests and p values.
  - support drill down and filter comparisons.
  - handle complex Boolean filters with both AND if and OR if statements.
  - pull data from multiple surveys and show in a single report.

## Proposal Format

The proposal must be in PDF format addressing all the above. Please email your proposal to Britanee Montano Irvine at [britanee@arriveutah.org](mailto:britanee@arriveutah.org) by 5pm MDT on June 14<sup>th</sup>.

### Proposal Outline

- Project Objectives- Please outline your understanding of Arrive Utah's objectives and key requirements.
- Solution Overview- Please provide a brief overview of your proposed solution including key functionality descriptions.

- Implementation Approach- Please provide a high-level implementation plan including major phases.
- Company Background- Please provide a general overview of your company.
- Project Team- Please detail the team which will be involved in supporting Arrive Utah throughout this project, including a brief bio on each team member's background and experience. Please identify who on the team will be Arrive Utah's point of contact, what interactions will look like, and what the response time will be.
- Support- Please provide a description of your post-implementation support and include what it will look like and who it will include.
- Budget- Please itemize your budget and identify one-time costs. If your company has different levels of pricing or different packages with technical capabilities, please take our objectives into mind and list as many as you feel are relevant. For example, if the number of users, surveys, or dashboards impact different costs.
- Data Security Information- Please provide information on your organization's security practices. This can be provided as a separate attachment if required.
- Past Performance- Please include 2-3 case studies of similar projects your organization has completed.
- Executive Summary- Please provide a summary of key benefits to your solution. Limit this section to 2 pages.
- Sample Contract- Please provide your company's standard terms and conditions to be used as the basis for contractual negotiations further in the process. This can be provided as a separate attachment if required.
- Exit Information- Please provide your company's standard paperwork of exiting a relationship with a client: how long does your company keep its clients' data; how long does a client have to retrieve data from the database; how does a client go about retrieving inputted data?
- Complete and attach Appendix A- Technical Capabilities Checklist for each pricing package offered.

### Preferred Method of Communication & Contact Information

For now, we prefer to communicate via email. If additional questions are required outside of this RFP, please email Britanee Montano Irvine at [britanee@arriveutah.org](mailto:britanee@arriveutah.org). In-person meetings and interviews will only be scheduled with our top two finalists.

Response to RFP should be submitted by email to [britanee@arriveutah.org](mailto:britanee@arriveutah.org) by 5pm MDT June 14<sup>th</sup> 2019.

Please ensure that you use the following naming convention in subject line: <<insert [Your Company], Proposal Submission>>

## Budget

Due to the extensiveness of what we envision the customizing to look like with an already built data and analysis tool, Arrive Utah has a budget of \$65,000 for this project. This budget includes the implementation costs, customization costs, initial costs, and usage of the platform for the three years. With this in mind, we do expect competitive bids to accurately reflect the functionality requirements in a cost-effective way. However, the lowest price point doesn't guarantee the winner of the bid, and proposals more than \$65,000 will still be taken into consideration if the return on investment is significant.

## Bidding & Evaluation

The evaluation is based on the Supplier's ability to meet our requirements in a practical and professional manner. We will evaluate based on design, skill, experience, compatibility, costs, and recommendations.

## Other Helpful Information

The following are very important in making a final decision and in the selection of a Supplier for this project:

- Technical Proficiency – Ability to understand all the components involved, understand our needs, and make recommendations based on experienced expertise.
- Communication – Communication is essential for this project. We will have a fully dedicated project lead on our end and would appreciate the same.
- Preferred No Outsourcing – We prefer to work directly with the local company to avoid delays, additional costs, or unclear communication that can occur with outsourced projects.
- Customer Service – We want to make sure we're taken care of and the company we select has ongoing healthy relationships with several existing clients.
- Experience – Additional relevant experience related to this project specifically, knowledge of our industry, and our objectives.

## **Appendix A**

## Appendix A- Technical Capabilities Checklist

Company Name: \_\_\_\_\_

Pricing Package Name (if applicable): \_\_\_\_\_

Additional information if additional cost can give explanations. How much cost to add dept. Please check which capability your tool can do. Use comment section to explain unchecked boxes.

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Platform Comments:

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Survey Design Comments:

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- provide built-in cross tabulation functionality.
- perform statistical testing via t-tests and p values.
- support drill down and filter comparisons.
- handle complex Boolean filters with both AND if and OR if statements.
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Analytics Comments:

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