

# **Request for Proposal**

## **Online Data Management**



**Proposals due at due at 5:00 p.m. (EST) Tuesday, May 28, 2019**  
**[jstamp@smartstartofmeck.org](mailto:jstamp@smartstartofmeck.org)**  
**Phone: 704.943.9410**

### **I. Purpose**

**To develop and support a user friendly on line grants management software system that integrates planning, application and reporting needs for programs funded by Mecklenburg Partnership for Children, or Smart Start.**

## **II. Background**

Mecklenburg Partnership for Children, or Smart Start, funds programs to ensure that children birth to 5 are successful in school and life. Roughly \$12,000,000 in funds are allocated each fiscal year (July-June). Although a proposal process is required every year, we are considering a three year strategic planning cycle. Currently, agencies submit applications through e-mail. Request for Applications (RFA) are generally issued annually in January and due in March. Applications are reviewed by Review Teams comprised of subject matter experts from our community, Board committee members as well as Smart Start staff. Recommendations are made to the Smart Start Board and final Board decision is made in late May or early June.

Each funded program must submit both fiscal and evaluation reporting on a scheduled basis. Financial status (expenditure) reports are due monthly. Cash and In-Kind reports and evaluation reports are due quarterly. Currently, fiscal reports are delivered via email or by hard copy to the Smart Start office. Evaluation reports require the submission of Excel spreadsheets electronically via e-mail. **Currently utilized documents and reports are available upon request.**

We currently fund programs in four specific goal areas. Applicants are required to select at least one goal area and one associated common output and outcome identified in each goal area RFA. Agency wide reports are completed annually and require the ability to aggregate and unduplicate program evaluation data.

Smart Start's website platform is Word Press.

For additional background information, visit our website [www.smartstartofmeck.org](http://www.smartstartofmeck.org).

## **III. Scope of Work**

Develop and implement an online grants management and reporting system that includes:

1. Strategic Plan Goals and Priorities
2. Request for Application documents
3. Application (including agency and contact data)
4. Review and allocations process and results
5. Evaluation Plan
6. Fiscal and Evaluation Reporting documents and process
7. Agency wide results
8. Dashboard

### **A. Essential Elements**

(Adapted from [Project Streamline's Online Applications and Reporting Guide Essential Elements](#))

1. Formatting
  - a. Ability to use basic user friendly formatting / review – copy and paste text, bold, underline, font color for help text, open ended responses, word counter, spell check.
  - b. Ability to save applications and reports often / easily and return to later to continue working.
  - c. Ability to edit saved applications and for applicants and Smart Start staff to collaborate.

- d. Error notices. If a required field is not filled out, or if incorrect information is entered (such as text in a numeric field), the online system should provide clear and simple feedback to the applicant about what the error is and how to fix it.
  - e. Ability to add attachments (PDF, Word, Excel, etc.).
  - f. Ability to preview and print a full application before starting and at any point before submission.
  - g. Ability to provide electronic signature
2. Account management:
- a. Simple account creation with lost password functionality, ability to identify, prevent and manage duplicate accounts.
  - b. Access to previously submitted applications and reports
  - c. Check status of request(s) online.
  - d. Ability to change contact/address information.
  - e. Storage and retrieval of past data.
3. Application management
- a. Ability to apply light branding – logo, potentially color scheme or font
  - b. Ability to require that certain fields be filled out.
  - c. Ability to include drop-down lists, check boxes and radio buttons.
  - d. Ability to group fields into categories, include hyperlinks, and incorporate at least basic HTML design elements like underlining, centering and bolding text.
  - e. Support for eligibility quizzes.
  - f. Branch logic. To allow applicants to easily answer only the questions that are appropriate to them.
  - g. Multiple-stage applications including an eligibility quiz, Letter of Inquiry or Intent (LOI), and a full-proposal. Applicants should be easily able to convert their submissions from one stage to the next.
  - h. Application programming interface should allow software developers to create programs that would “talk” to the database.
  - i. Acknowledgement of receipt of submission.
  - j. Ability to generate award/denial letters.
4. Reporting:
- a. Ability to import and export report data using Excel
  - b. Ability to report on bid submission process (number of applications received, agencies submitting applications)
  - c. Ability for funded programs to submit monthly, quarterly and annual fiscal reporting forms  
Ability for funded programs to submit quarterly evaluation reports and respond to monitoring reports.
  - d. Ability for Smart Start evaluation staff to develop reporting forms, monitoring reports, partner performance reports and Individual activity reports.
  - e. Ability to track dates reports are due/received and payments made
  - f. Ability to retrieve and display aggregate data.
  - g. Build standard reports and allow for ability to generate ad hoc reports.
  - h. Flexible data visualization

## **B. Additional Requirements:**

- 1. The following users must have access to the system
  - a. Grant Applicants
  - b. Funded Programs (grant applicants whose programs were funded)
  - c. Smart Start Fiscal and Evaluation staff

- d. Grant reviewers (Smart Start staff, Board Members, and community volunteers)
2. Training expectations
  - a. 2-3 Smart Start staff trained as administrators.
  - b. End user training for Smart Start staff, applicants, funded programs and grant reviewers.
3. Support expectations
  - a. Training to support implementation
  - b. Support to address problems encountered after system goes live
  - c. Support to make changes and improvements
  - d. Live chat capability would be helpful, but not necessary

### C. Characteristics:

1. **Secure:** Access for review and management purposes needs to be secure and restricted to specific users.
2. **Flexible/Expandable:** Must have ability for modification on user or vendor end to adjust information collected, reports generated, and data sharing preferences. Must have ability to add users and the ability to inactivate (without deleting data) provider agencies or users.
3. **Able to serve up to 40 applicants, 20 funded programs, and 15 funded agencies**, with at least a fiscal user and an evaluation user needing access to submit reports from each agency, 2-3 Administrative users at WCSS, **up to 15 grant reviewers.**

## IV. Deliverables

1. **Initial planning and development meeting**
2. **Development of prototype system**
3. **Review and testing of system**
4. **Final development of system**
5. **Training**
6. **Implementation of system**
7. **Ongoing technical assistance and support**

## V. Project Proposal Timeline

1. Proposal due: **May 28, 2019**
2. Proposal awarded: **June 7, 2015**
3. Start date: **July 1, 2019**

## VI. Proposal Instructions

- **Statement of Interest:** In order to know how many bids we can expect please send a brief e-mail by **5:00 PM EST Friday, May 17, 2019** informing us of your intention to submit a proposal.
- **Prepare a proposal** describing your background, qualifications and methods/ timetable for completion of the deliverables identified in section IV. It is acceptable to propose a phased approach to the Scope of Work elements identified in section III.
  - Include a timeline that covers the deliverables specified in section IV as well as major milestones and approval steps for development / implementation.
  - Describe technical support options and costs.
- **Provide three references** (current or former clients) and availability to provide a demo of at least one similar product.

- **Prepare a line item budget narrative.**

It is acceptable to provide multiple budgets reflecting different cost and service options or a phased approach to the Scope of Work elements.

**Proposals containing the above information are due by 5:00 PM on Tuesday, May 28th, 2019.**

**Please send Proposal to Jennifer Stamp  
jstamp@smartstartofmeck.org**

**If you have any questions related to this bid, feel free to contact Jennifer via e-mail or by phone at  
704.943.9410.**