



# REQUEST FOR PROPOSAL

Communications Platform

Spectrum Community Services, Inc.

2621 Barrington Court  
Hayward, CA 94545

Carrie Oldes

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## I. Introduction

### A. Purpose of this Request for Proposal

Spectrum Community Services, Inc. (Spectrum) is seeking proposals for a client management database for use with a telephone reassurance and visiting program.

Spectrum will use a competitive process to select a qualified Firm, based upon qualitative and technical criteria to provide a communications platform that meets our internal needs. The objective of the solicitation is to select a Firm and execute a contract for services.

The information sought through this RFP is to determine the most cost effective and functional product.

### B. Spectrum's Background

Founded in 1971, Spectrum strives to improve the health and safety of seniors and low income residents in Alameda County by enhancing their quality of life and helping them age at home with dignity. Spectrum is a registered, private non-profit organization with multiple government contracts and private funders. The Connect Program we plan to use this software with is a new program offering phone calls and visits. We plan to begin this year with 50 clients but expect this number to grow rapidly. It is important to our Agency to assist our community with the needs of the growing senior population. As with all of our programs we anticipate serving hundreds of clients with visits and calls.

### C. Oversight, Management, and Contacts

In order to control information disseminated regarding this RFP, Firms interested in submitting a Proposal are directed not to make personal contact with members of the Spectrum Board and Administration with the exception of the individual listed below.

#### **Oversight**

Carrie Oldes will provide oversight to the RFP process.

Carrie Oldes, Meals on Wheels Program Manager

[coldes@SpectrumCS.org](mailto:coldes@SpectrumCS.org)

925-483-1989

#### **Liaison**

Riley York will serve as the contact point for RFP responses, coordinating the services and serve as the communication link between Spectrum and the Firm.

Riley York, Data Technician, Spectrum Communications

[ryork@SpectrumCS.org](mailto:ryork@SpectrumCS.org)

510-709-5283

## II. General Instructions

### A. Key Dates

- ❖ RFP Release Date: Monday, November 7, 2022
- ❖ Last Day to submit: 2:00 PM. (PST), Tuesday, December 6, 2022
- ❖ Review Period: Tuesday, December 6, 2022 - Tuesday, December 13, 2022
- ❖ Oral Interviews, if needed: Wednesday, December 14, 2022 - Friday, December 16, 2022
- ❖ Selection Date no later than: Thursday, December 22, 2022

### B. Submittal of RFP

RFP's should be reviewed for accuracy before submission to Spectrum since said document may not be adjusted after submission. Spectrum will not be responsible for errors or omissions in the RFP. Spectrum reserves the right to reject any and all RFP's, or to waive any irregularities, or informalities in the RFP's.

Each Firm submitting a RFP must submit their response in a PDF file sent to [ryork@spectrumcs.org](mailto:ryork@spectrumcs.org)

Response shall be in 12-point font, approximately 8 ½" x 11" format, not to exceed twenty-five (25) pages.

### C. Disqualified RFP

Any RFP received after 2:00 PM. (PST) on Tuesday, December 6, 2022, shall be refused.

### D. Withdrawal of RFP

Firms may withdraw their RFP by written request at any time prior to the deadline.

### E. Debarment, Suspension and Ineligibility

By submission of your qualifications in response to this announcement, you are certifying that neither your firm(s) nor any of their principals are presently debarred, suspended, declared ineligible, or excluded from participation in this procurement process by any Federal department or agency. Further, if such a debarment or suspension occurs during the course of the evaluation process, you shall inform Spectrum immediately.

### F. Conflicts of Interest

By submission of your qualifications in response to this announcement, you are certifying that your firm has no business or personal relationships with any other companies or persons that could be considered as a conflict of interest or potential conflict of interest to Spectrum, and that there are no principals, officers, agents, employees, or representatives of your firm that have any business or personal relationships with any other companies or persons that could be considered as a conflict of interest or a potential conflict of interest to Spectrum, pertaining to any

and all work or services to be performed as a result of this request and any resulting contract with Spectrum.

### **III. Scope of Product**

Provide Spectrum with a Scope of Work that can be implemented in your response throughout Section IV, Contents of RFP. The selected Firm will provide a unified solution for a client management database, including, but not limited to the following features:

- A. Dialing service to connect volunteers to seniors using a masking number
- B. Volunteer and senior database to collect call information, demographics for reporting, and scheduling
- C. Reporting
- D. Volunteer tracking: minutes per call, etc.
- E. Volunteer: client specific association
- F. Volunteer self signup. ex. through a web portal
- G. Post-visit information collection from volunteers: ex. Change of Condition, notes, priority follow-up, etc
- H. For in-person visits: Home information ex. know gate codes, "go to the side door", pets, etc.

In addition, the following features are not required, but will reflect positively on the final score given in the Product Features Criteria in Section V, Selection Criteria.

- I. Intake details for volunteers and seniors: Availability, likes/dislikes, personality
- J. Volunteer access to own schedule: set vacations, sick time, request changes
- K. Substitute/Sick system: have temporary volunteers take over for a volunteer's schedule (or part of it) if they get sick or take vacation
- L. Pause service for a senior
- M. Video Chat system
- N. Volunteer access to limited information about a senior: ex. notes from previous visits, emergency contact info, etc.
- O. Custom queries. Explain process
- P. Mobile app for volunteers
- Q. Week-long volunteer calendar schedule view
- R. Product ability to integrate with our current meals on wheels and recreation class database system: ServTracker
- S. Product with additional modules to replace our current meals on wheels and recreation class database system

## IV. Contents of RFP

### A. General

In order for RFPs to be considered, said RFP must be clear, concise, complete, well organized, and demonstrate both the firm's ability to follow instructions and product's functionality. The quality of answers, not length of responses or visual exhibits is what is important in the RFP

All Firms responding shall follow the order and format specified below. Each section of the RFP shall be labeled to correspond to the numbers/headers shown below (Sections IV.B - IV.G).

### B. Submittal Letter

The cover letter shall be brief (one-page maximum). Include:

1. The RFP's title and submittal date.
2. The name, address, email, and telephone number of the responding Firm's point of contact.
3. Brief summary of the Firm's experience, the unique qualities and what will make the product a good fit for Spectrum's client management database

*The submittal letter will **NOT** be considered part of the twenty-five (25) page limit.*

### C. Table of Contents

Include a complete and clear listing of headings and pages to allow easy reference to key information. The table of contents will **NOT** be considered part of the twenty-five (25) page limit.

### D. Description of Firm

1. Describe the Firm's experience in providing a client management database to other businesses of a similar size.
2. Describe any unique capabilities that your Firm offers.

### E. Project Approach

1. Explain your process associated with implementing your product for a client. This should include a timeline for full functionality from project start.
2. Give a detailed list of all features and options your Firm recommends Spectrum use to address the Scope of Work, Section III.
3. Describe your Firm's product support system, hours of availability, average wait times between 8:00am - 5:00 PM PT M-F.

## **F. Fee Structure**

Please describe your pricing model. For evaluation purposes, please break down the unit rates (per user/license) and additional costs related to your Product that your Firm proposes to provide to Spectrum:

1. Base rate, monthly
2. Unit rate per user or license, monthly
3. Costs for additional optional services, monthly, if applicable
4. One time implementation fee
5. Any other fees, costs, taxes, etc... for services

## V. Selection Criteria

Firms submitting proposals are advised that all proposals will be evaluated to determine the "most qualified" Firm that will be able to meet the needs of Spectrum. The selection criteria will include, but not be limited to, the items listed below.

### RFP - Evaluation and Award Process

Spectrum will select Firm(s) that will be used to cover the Scope of Product in this RFP with the understanding that the selection and contract is conditional on approval by the Executive Director. Representatives of the agency will evaluate proposals. This committee hereinafter will be referred to as the "Review Panel."

The Review Panel will review and score each RFP on the six (6) different criteria sections listed below. The scale used where zero (0) is the lowest. There is a maximum of 100 points.

#### Scoring Criteria

#	Criteria	Maximum Points
1	Firm background, qualifications, and quality of service	10
2	Product features	25
3	Product support availability	15
4	Project implementation approach	20
5	Experience and commitment to working with similar agencies/employers.	5
6	Fee structure and transparency	25
	<b>Total Points:</b>	<b>100</b>