Opportunities Exchange

DEMYSTIFYING THE RFx

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As more organizations embrace an Early Childhood Technology Ecosystem, we are seeing projects emerge that have more complexities: multi-year/multi-vendor engagements, integration of multiple software systems, and the need to capture real-time data. These types of projects, in any sector, require a deeper level of specificity and more rigorous support for decision-making. Document names like RFP, RFQ, RFI, and RFA are bandied about at the start of new projects with almost universal confusion. What do these terms mean? What is their purpose? What is the difference between them? When to use which? This article seeks to clarify the confusion and define these important three-letter acronyms.

THE "REQUEST FOR" ROADMAP

Within the category of documents labeled "RFx", the **RF** stands for "*Request For*". It means "Request For **Something**". That *something* is defined by the 3rd letter: RF**P** = Proposal, RF**I** = Information, RF**Q** = Quote/Quotation, RF**A** = Request for Application. Let's clarify when to use each, and then take a closer look into the content and use.

The purpose of any "Request For" document is to find the best match between the requestor (buyer) who is interested in something specific, and an applicant (seller), who believes they can provide optimal alignment to those specifics. The requestor could be a program manager or a government entity, while the applicant could be a service provider (vendor or consultant.) The requestor creates an RFx to clearly define requirements and outcomes. From these specifications, the seller determines if they can successfully meet the RFx's (requestor's) requirements.

The table below provides guidelines for when to utilize each type of RFx document.

RFx	When to Use	For what Purpose	Desired Outcomes
RFP Request for Proposal	Use for a larger or longer duration project. Use for strategic projects where outcomes are not as clearly known.	• Mitigate risk on big projects • Create clear accountability	Find the best match for the specified project based on multiple, detailed criteria.
RFI Request for Information	Use to gather information before starting a big project or making a purchase.	• Collect information relevant to an upcoming purchase • Collect information to help define and plan upcoming projects.	Become more knowledgeable before making purchase decisions. A vendor "short list". Consolidate project planning information.
RFQ Request for Quote	Use when requirements, timeline and budget are well known.	• Gather prices (quotes) from vendors on a specific set of requirements.	Ability to make an apples-to-apples cost comparison for vendors doing the same work.
RFA Request for Application	Use to announce and offer a grant award to multiple vendors who meet the needs and requirements of a program.	• Seek to find and engage more than one vendor who meets the needs of a project	Multiple vendors meet the criteria laid out in the application and receive a grant award.

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RFP

An RFP, Request for Proposal, is generally the most substantial and perhaps a superset of all the other documents. It is used for large, strategic projects and usually has a longer timeline and bigger budget. For an RFP, many project stakeholders come together to define the project and compile information that clearly defines key objectives, timelines, deliverables, and budgets. In a big-budget RFP, the more detailed the information the better. This clarity ensures that all applicants truly understand what is being requested of them.

What are the primary elements of a good RFP? Let's start with a set of key information. As with any new project, whether internal or outsourced, the place to start is with a *Scope of Work*. The Scope of Work is an overview of the project and outlines the key objectives. Often it provides a synopsis of the requestor (company info, context of project, etc.), and ideally, it is written to encourage qualified entities to respond (i.e., engagement is a multi-year project, the applicant will become a strategic partner in a major initiative, etc.)

To further define the project, *Key Tasks* are outlined which break down the duties of the project into smaller activities to the point where the applicant fully understands the project's scope.

Key Elements of a Request for Proposal (RFP)		
Scope of Work	• Overview of project • Company info/background • Context of work requested	Written to provide project overview and objectives. Should encourage qualified applicants to respond.
Key Tasks	• Details smaller pieces of project work • Tasks aligned with project objectives	Written to ensure clarity to applicants about specific project duties.
Deliverables	• Work product of the project • Proof and history of work performed • Reference material post-completion	Write to guarantee that the requestor receives sufficient documentation of the work performed.
Timeline	• Sets the duration of project • Includes interim dates for milestones or deliverables	Create to communicate the beginning and end date of the project, including interim key dates.
Budget	• Total dollar amount allocated to project • Terms of payment included, i.e., milestone-based payments.	Create to provide the applicant with the total amount that will be paid upon completion of the project. Payments may be tied to deliverables.

Next is a list of *Deliverables*. This is a concrete set of items that are the expected work product of the endeavor. Research documents, meeting minutes, survey results, design documents, interviews, etc., can all be considered deliverables. Any item that will help document the course of the project should be included as a deliverable.

Finally, including both a *Timeline* and *Budget* are critical. The Timeline sets the start date, end date, and any interim milestones along the way. An accurate Budget is important for the applicant to get a sense of whether they can accomplish the project within the confines of the timeline and budget.

All RFx documents include a section that outlines the submission instructions for the applicant. This includes how the requestor would like the submissions (email, web form, etc.), the format of the submission, requestor contact information, and timeline. A timeline might include one deadline to indicate interest in submitting, and another deadline for the submission itself.

The information above should be included in any good RFP. An even better RFP would contain questions/requirements that will help "weed out" weaker vendors who respond to the proposal but may not be the best candidates. This will help avoid selecting a vendor who underperforms, is over budget, or both. This additional information is typically tailored to the specific needs of the project. For example, if the outcome of the RFP is to select the best childcare management software for providers (network, county, state), detailed vendor information is important:

- How many years of experience does your company have delivering childcare management software?
- Describe your commitment to customer service, in terms of processes and responsiveness to customer needs.
- Provide three customer references

RFP
Templates + Examples

- **Sample SSA RFP Template**
- **SSA RFP Fillable Template**
- **CCMS RFP Outline**
- **Stronger Together RFP Early Learning Indiana**

THE RFI

An RFI, Request for Information, is used to gather general information about an organization, a product or service which will help define and/or plan an upcoming project. It can also be used to gather specific information related to an imminent purchase.

Instead of a project Scope of Work (SOW) as in an RFP, the RFI begins with the "Statement of Need" (SON) to explain why particular information is needed. As with the SOW, the SON can include project context and information about the entity issuing the RFI.

Unsurprisingly, the primary section in an RFI is "Requested Information". It includes a list of the most important specific information that is needed to make intelligent next-step decisions. The information requested of the applicant should be detailed, clear, and aligned with the Statement of Need. For instance, if the SON is to find a particular software product that helps automate parent/teacher communication, the following information might be useful:

- Provide an overview of your product and how it enhances parent engagement.
- List key differentiators of your product over competitors
- Provide an example of a live use-case that is similar to our requirements
- Does your product provide function A, function B, function C? (i.e., mobile texting, notifications to parents, bilingual communication?)
- Outline your training support and frequency/duration of training.
- What is the pricing model for your software?

RFI Examples

- **Missouri DESE CCDS Child Care Data System Project RFI**
- **VA VECF RFI Vendor Response**

THE RFQ

An RFQ, Request for Quotation, is the simplest document to understand but to be effective, it needs to contain details. It is created when requirements, budget, and timeline are known and all that is needed from a vendor is a formal quote and payment terms. The RFQ creates a straightforward, apples-to-apples comparison between vendors, knowing that they can meet all requirements, timelines, and budget. Since the only variables are cost and payment terms, it is easy to compare the bottom line.

THE RFA

An RFA, Request for Application is different from the other RFx documents. In this case, the requesting organization is announcing the availability of grant funding to any applicant who meets the specified requirements. A Statement of Purpose outlines the purpose of grant funding and specifies the grant award amount. Key sections of this document contain application requirements and the "evaluation criteria". These sections tell the applicant exactly what is required and how their solution or service will be evaluated to receive grant monies. The assumption is that if any of the key requirements are not met, the applicant will not be selected for funding. The requesting organization includes a timeline for submission as well as how the applicant will be notified of a grant award.

RFA Examples

- **Louisiana CCMSI RFA Vendor Application**
- **Wisconsin Shared Services Application**

RFx CLARITY

Deciphering the 3-letter RFx acronyms is the first step, but by understanding when to use each RFx document, you will have the right tool for each new project. RFx documents create clarity and set expectations so that when decisions are made around vendors, they can be made with more rigor, less risk, and higher levels of confidence.

Shared Services Alliance RFP Worksheet

4.1 Program Model Overview and Implementation

The goals and required components for each Shared Services Alliance Hub awarded under this RFP are specified in this section of the RFP. Grantees will have access to shared services experts and staff who will provide technical support to help Grantees fully build out their program model, implementation plan, and use of child care management software systems. The State of Iowa's procurement for identifying up to two financially supported child care management software systems (CCMS) is underway. Awarded Shared Services Alliance Hubs will not manage the CCMS across all members of the network but will help build Alliance membership awareness and use of CCMS. The CCMS will facilitate data sharing, efficient and effective business supports, and enable the Alliance to achieve scale.

The goals of the Shared Services Alliance Hub program model supported under this RFP are:

1. Strengthening business leadership via technology (i.e. utilize child care management software) and a focus on the Iron Triangle of ECE Finance metrics;
2. Reducing administrative overhead (i.e. marketing, enrollment, payroll, billing and fee collection, administrative staff, etc.), staffing costs (i.e. human resource supports, etc.) for Shared Service Alliance Hub Members;
3. Producing tangible cost-savings and increasing revenues for Shared Service Alliance Hub Members;
4. Helping participating programs shift revenue and reinvest cost-savings to improve the quality of child care services, such as increased compensation for child care staff or other goals identified by the Shared Services Alliance Hub Members;
5. Achieving sustainability of the Shared Services Alliance Hub through membership fees and other third-party fundraising to cover the ongoing cost of services provided by the Shared Services Alliance Hub.

4.2 The Grantee will be expected to support a Shared Services Alliance Hub with the intention to meet those stated goals and will include the following components:

1. Commitment to Shared Services Alliance Hub Members success and support:
2. Support and listen to Shared Services Alliance Hub Members, including creating systems for clear communication and feedback loops with and among Shared Services Alliance Hub Members;
3. Create structures that hold Shared Services Alliance Hub Members accountable for establishing effective and efficient business in their programs;
4. Operate efficiently and with a low administrative budget to support the Respondent's own management and oversight of the Shared Services Alliance Hub.

4.3 Basic Services to Be Provided to Shared Services Alliance Hub Members

1. Collect, track and report results based on the Iron Triangle of ECE Finance.
2. Provide at least two or more of the shared services. (Limited to the services listed in Section 1 of this RFP.)

4.4 Commitment to Data Use

1. Implement continuous quality improvement to enhance and modify work throughout the implementation in response to data, Shared Services Alliance Hub Member feedback, and emerging needs;
2. Collect and analyze data metrics on behalf of Shared Services Alliance Hub Members;
3. Regularly present Iron Triangle of ECE Finance data to Shared Services Alliance Hub Members, both individually and as a group, to help guide decisions and understand the impact of shared services.

4.5 Metrics

1. The Hub must design a way to collect baseline data in order to understand the change/ impact of the Alliance.
2. Number of Shared Services Alliance Hub Members by child care provider category;
3. Shared Services Alliance Hub financial data (including expenditures of contract funds and other federal/state/private dollars);
4. Overall enrollment as a percentage of staffed capacity;
5. Uncollected revenue by category (family fees, government subsidy, etc.);
6. Personnel cost as a percentage of total program budget;
7. Personnel cost by position type: percentage administration, percentage program (teaching, non-teaching);
8. Level/type of benefits, including but not limited to, paid time off – vacation and sick pay; insurances – health, dental, vision, life, etc.; employer contribution to a 'qualified' retirement account; and time out of the classroom for planning/reflective practice;
9. Staff turnover rate;
10. Gross revenue growth; and
11. Operating margin – expenses as a percentage of total revenue
12. Membership fees charged, provider memberships that are canceled/ended by provider category; services provided/offered; changes over time

Overview

The successful Respondent shall provide the goods and/or services to the State using the Contract in accordance with the specifications as provided in this Section. The Respondent shall address each specification in this Section and indicate whether or not it will comply with the specification. If the context requires more than a yes or no answer or the section specifically indicates, Respondent shall explain how it will comply with the specification. Proposals must address each specification. Merely repeating the specifications may be considered non-responsive and may disqualify the Respondent. Proposals must identify any deviations from the specifications of this RFP or specifications the Respondent cannot satisfy. If the Respondent deviates from or cannot satisfy the specification(s) of this section, the Agency may reject the Proposal.

1. Mandatory Specifications

All items listed in this section are Mandatory Specifications. Respondents must mark either **"yes" or "no"** to each specification in their Proposals. By indicating "yes" a Respondent agrees that it shall comply with that specification throughout the full term of the Contract, if the Respondent is successful. In addition, if specified by the specifications or if the context otherwise requires, the Respondent shall provide references and/or supportive materials to verify the Respondent's compliance with the specification. The Agency shall have the right to determine whether the supportive information and materials submitted by the Respondent demonstrate the Respondent will be able to comply with the Mandatory Specifications. If the Agency determines the responses and supportive materials do not demonstrate the Respondent will be able to comply with the Mandatory Specifications, the Agency may reject the Proposal.

5.1 Enter Mandatory Specifications

5.1.1 Applicants must be able to do business with the State of Iowa (tax-exempt nonprofit organization, LLC, etc.). Be designated as a tax-exempt organization classified as a Section 501(c)3 under Internal Revenue Code, or local government or 28E status. For vendor registration documents, go to: https://das.iowa.gov/procurement/vendors/how-do-business

5.1.2 Demonstrate the ability to obtain and manage private match of funds and/or services; Match funding is described in 5.2.7 of this RFP.

5.1.3 The ability to pay for services up front and then submit invoices with supportive documentation in order to be reimbursed.

5.1.4 The ability to track and submit required data, such as but not limited to; current expenditures that demonstrate an on-going record of expenditures aligned with the implementation of shared services and remaining available funds.

5.2 Scored Technical Specifications

All items listed below are Scored Technical Specifications. All specifications will be evaluated and scored by the evaluation committee in accordance with Section 6, Evaluation and Selection.

5.2.1 Provider Participation

5.2.1.1 Identify Eligible Child Care Providers you intend to serve (centers, homes or both)? How many Eligible Child Care Providers do you anticipate will participate in year one? And in subsequent years? Approximately how many children and families do these providers serve? (100 words)

5.2.1.2 Explain the current local ECE landscape, access barriers, and needs in the region and Eligible Child Care Providers you intend to target. (200 words)

5.2.1.3 Identify the challenges you anticipate when launching this Shared Services Alliance Hub? What strategies will you take to address these barriers? Examples may include language barriers for providers, educational barriers for teachers, lack of community investment in quality, etc. (200 words)

5.2.2 Organizational Readiness

5.2.2.1 Describe the experience your organization has in improving early care and education business leadership and/or scaling operational efficacy. (200 words)

5.2.2.2 Describe any local, regional, state or national resources your organization can leverage as a match to support the launch and implementation of your Shared Services Alliance Hub. These may be financial, operational, collaborative partnerships, etc. (200 words)

5.2.3 Shared Services Alliance Hub Services

Select all services that will be offered with the launch of your Hub. (Checklist)

- ☐ Bulk purchasing- *of goods and services, including but not limited to classroom supplies and equipment, etc.*
- ☐ Benefits: *Health care, (including navigation support for the Affordable Care Act Exchange), retirement, Telemedicine, Paid Time Off (PTO), Health Savings Accounts (HSA), etc.*
- ☐ Tax Preparation and Support
- ☐ Accounting and Bookkeeping
- ☐ Marketing and recruiting (children/parents) and enrollment support
- ☐ Non-Profit board consultation, education, and management supports
- ☐ Payroll Processing
- ☐ Child and Adult Care Food Program (CACFP) Administration
- ☐ Human Resources Support: *including salary scale, job descriptions, staff recruitment, screening, on-boarding, Human Resources policies*
- ☐ Legal Support
- ☐ Technology support- *hardware and software connectivity*
- ☐ Billing and Fee Collection
- ☐ Facilitating provider access to multiple funding streams, *including: private scholarships, child care subsidy, Head Start and Early Head Start, PreK, etc; and helping families access public subsidy*
- ☐ Transportation services
- ☐ Fundraising and development support
- ☐ Farm to Table- work with local producers to leverage access to fresh foods
- ☐ Liability Insurance awareness and enrollment support
- ☐ Facility repair, maintenance, janitorial services

5.2.4 CCMS Technology

In addition to selecting one or more of the above services, each Shared Services Alliance Hub must agree to ensure that all Shared Services Alliance Hub Members use an automated child care management system (CCMS) to support operations and data collection to track business metrics. Describe how you intend to meet this requirement (50 words)

5.2.5 Data metrics

Each Shared Services Alliance Hub must agree to collect, track and report results based on the Iron Triangle of ECE Finance. Additional metrics should be specific and relate to individual services offered. Grantees must be able to track baseline and ongoing metrics to show the benefit of shared services for Shared Services Alliance Hub Members. For each service selected, Respondent must detail:

- Proposed metric(s) to be collected, and
- Plan for baseline and ongoing data collection and analysis. (100 words)

5.2.6 Shared Services Alliance Hub Operations

5.2.6.1 What is the target region for your Shared Services Alliance Hub? Identify cities, towns and/or counties the Shared Services Alliance Hub will include (50 words)

5.2.6.2 Explain the governance and staffing model necessary to operate your Shared Service Alliance Hub. Staffing models should maximize access to needed expertise and minimize cost. Considerations for your staffing model include: (200 words)

- Can your organization’s existing staff, consultants and subcontracts with other organizations be leveraged?
- Do you envision staffing from existing personnel, or the recruitment of new staff?

5.2.6.3 Describe the membership composition needed to operate your Shared Service Alliance Hub. Include details such as ideal number and type(s) of eligible child care provider, as well as characteristics or experiences that would be beneficial. (150 words)

5.2.7 Match Proposals must include a budget that demonstrates 70% of funding from the Shared Services Alliance Hub contract and 30% from private sector local match. Private match can include the value of the following contributions:

- Cash or private funding
- Provider fees
- Project specific salary - salary expenses for whomever is performing the service (i.e., if payroll, would be the salary expenses for that individual.)
- Labor - costs related to services performed by an organization that is not the respondent
- Materials - items needed for the shared services alliance hub to do the service identified
- Equipment (i.e. use of computers, software, copy machine, etc.)

Match contributions may be in the form of cash or in-kind services; no more than 10% can be in-kind. For example, a project budget of $50,000 is eligible to apply for $35,000 in funds from Shared Services Alliance contract. Of the $15,000 match requirement, $1,500 can be in-kind match.

Cash-match: Cash that is contributed specifically to cover the actual costs of a program.

In-kind match: Direct contributions to the project in the form of an effort or goes with dollar value specified. These amounts must be: verifiable, directly necessary for proper and efficient accomplishment of project objectives, and from non-governmental sources.

What are the limitations on local match?

If cash-match is identified, a letter from the private source is submitted with the application.

If in-kind match is identified, provide a description of the source(s) of funding within the application.

Local match contributions must be from non-governmental sources;
Match counted must be received during the project period;

The same cash, effort and/or goods cannot be used to match more than one project.

Contract funds will not be expended until grantee can show match funds are secured. (200 words)

5.2.8 Technology

5.2.8.1 Describe how the needed technology will be used to support the Shared Services Alliance Hub members. (50 words)

5.2.8.2 Describe your organization's current technology infrastructure, include usage of technology and for what purposes. (200 words)

5.2.8.3 Explain your proposed Shared Services Alliance Hub technology solution(s). Note that your technology solution should ensure that Iron Triangle of ECE Finance metrics can be collected and analyzed as well as to facilitate implementation of other services your Shared Service Alliance Hub will offer. (200 words)

5.2.9 Member Recruitment

Describe your organization's plan for identifying Eligible Child Care Providers and sharing the value proposition of shared services. What tools and resources does your organization currently use for communication and marketing to ensure you reach your intended audience? (200 words)

5.2.10 Timeline

Grantees must expend contract funds by June 30, 2024.

Describe your detailed timeline to launch your Shared Service Alliance Hub. Include key milestones such as securing staff and/or contractors, recruiting Eligible Child Care Providers, collecting baseline data, rolling out services/supports identified in your Proposal, etc. (200 words)

5.2.11 Indirect/Administrative Costs

Applicants may charge either indirect or administrative costs, but not both. If charging administrative costs, costs may not exceed 15% of the total budget.

5.2.12 Sustainability Plan

This contract will provide funding for the initial Shared Services Alliance Hub launch and implementation. However, successful Respondents must anticipate how they will ensure sustainability when these contract funds are no longer available. Describe your plan for sustainability, including but not limited to calculating and implementing membership fees, leveraging other third party funds, maximizing technology and achieving deeper levels of efficiency to lower costs, finding additional partners, etc. (200 words)

5.3 Optional Specifications

All items listed below are optional, non-mandatory specifications. These specifications will be evaluated and scored in the technical proposal. Cost for optional specifications shall be identified in the cost proposal; however, costs for optional specifications will not be considered in the determination of the cost score.

5.3.1 The State of Iowa will prioritize applications that target one or more of the optional specifications. Describe how you will serve providers whose enrollment includes: (200 words)

- ☐ serving families in the Child Care Assistance Program,
- ☐ programs participating in either the IQ4K® or QRS,
- ☐ programs serving refugee/minorities/underrepresented populations),
- ☐ programs that have staff participating in T.E.A.C.H. Early Childhood ® IOWA
- ☐ programs that have staff participating in WAGE$ ® IOWA
- ☐ new Eligible Child Care Providers (began operations within the previous year)
- ☐ participating in a workforce compensation program with community partners

3.2.3 Applicant Information:

Name:

Address:

Phone:

Email:

Form of business entity:

Subcontractors: Identify the name, contact information and qualifications of any subcontractors who will be involved with this project the Respondent proposes to use (i.e. to provide/deliver shared services) and the nature of the goods and/or services the subcontractor would perform. If not determined by time of submittal, provide an overview of any criterion you have set for the entity and strategy for identifying the entity to perform the service.

Respondent's accounting firm (*submit copy of most-recent audit*). If no audit, describe if the Respondent has an accounting firm or process for conducting the accounting functions for their organization.

3.2.4 Experience: The Respondent must provide the following information regarding its experience and those that would be providing the service(s) identified:

3.2.4.1 Number of years in business.

3.2.4.2 Number of years of experience with providing the types of goods and/ or services sought by the RFP.

3.2.4.3 The level of technical experience in providing the types of goods and/or services sought by the RFP.

3.2.4.4 A list of all goods and/or services similar to those sought by this RFP that the Respondent has provided to other businesses or governmental entities

3.2.5.1 Has the Respondent had a contract for goods and/or services terminated for any reason? If so, provide full details regarding the termination.

3.2.1 Criminal History and Background Investigation

The Respondent hereby explicitly authorizes the Agency to conduct criminal history and/or other background investigation(s) of the Respondent, its officers, directors, shareholders, partners and managerial and supervisory personnel who will be involved in the performance of the Contract. .

Stronger Together RFP

Early care and education operates within an economically fragile business model. In the best of times, early care and education providers operate with razor-thin margins as a result of the misalignment between the actual cost of providing care and the ability of families to afford it. The recent COVID-19 outbreak has further challenged early learning providers, adding safety-related expenses while substantially eroding enrollment, which serves as the lifeblood of early education operations.

To help sustain existing high-quality providers, influence the affordability of service and enable early childhood leaders to focus their scarce time and resources on the business of learning, Early Learning Indiana (ELI), with generous support from Lilly Endowment, seeks to foster regional shared service models that provide members with various business and pedagogical services to build operations and enable resources to be redirected toward learning outcomes.

Eligibility:

Applicants must be a tax-exempt nonprofit organization incorporated in the State of Indiana.

Grant Details:

Eligible organizations may submit a proposal for up to $100,000 to launch their shared service hub. Grant funds must be used to cover costs related to the start-up implementation of a shared service model. Examples of allowable expenses include one-time startup costs, a technology solution, initial operating expenses and implementation-related consulting services. Awardees may request uses outside those described, but they are subject to declination. Funds may not be used for direct programming.

For full eligibility criteria, further details on approved uses of funding and additional information, visit the fund website at earlylearningindiana.org/stronger-together.

Applicants who need assistance with their submission should email natalieb@earlylearningindiana.org.

Early Learning INDIANA

Hub Demographics

- Primary contact name, title, phone (email)
- Organization name
- Brief organizational description
- Mission
- Website
- Proof of non-profit status (upload)
- Organization type (early childhood provider, community foundation, community organization, school district, higher education institute, healthcare provider)

Narrative

Stronger Together grantees will launch a shared service Hub that provides members with various business and pedagogical services to build operations and enable resources to be redirected toward learning outcomes. Hubs must understand their local early childhood education landscape, exhibit a pattern of execution success and be prepared to lead change with early learning providers.

Target Region

- What is the target region for your Hub services? Detail cities, towns and/or counties. (50 words)
- Explain the current local ECE landscape, access barriers, and needs. (200 words)
- What challenges do you anticipate when launching a Hub in this region? What strategies will you take to address them? Examples may include language barriers for providers, educational barriers for teachers, lack of community investment in quality, etc. (200 words)

Organizational Readiness

- Describe your organizational history of collaborative change efforts within the past three years. (200 words)
- Describe the experience your organization has in improving and/or scaling

operational efficacy. (200 words)

- Describe any local, regional, state or national resources your organization can leverage to support the launch and implementation of your shared service Hub. These may be financial, operational, collaborative partnerships, etc. (200 words)

Business Plan

Business plans should address objectives, goals and implementation of services. For examples and templates to assist applicants with submissions, please visit the grant webpage at earlylearningin.org/stronger-together.

Hub Services

- Select all services that will be offered with the launch of your Hub. (checklist)

- ☐ Offer substitute pool
- ☐ Offer bulk purchasing
- ☐ Offer insurance
- ☐ Offer tax preparation
- ☐ Develop policy handbooks and contracts
- ☐ Marketing and recruitment supports
- ☐ Enrollment management
- ☐ Assist with attendance monitoring
- ☐ Help with recordkeeping/bookkeeping
- ☐ Assist with access to CACFP funding
- ☐ Recruit and onboard staff
- ☐ Serve as a public subsidy contract
- ☐ Invoice and collect payments
- ☐ Provide financial reports
- ☐ Establish business metrics
- ☐ Coach to meet business metrics
- ☐ Provide technology support
- ☐ Perform fundraising functions and support fund development
- ☐ Support janitorial and maintenance services
- ☐ Provide human resources service
- ☐ Conduct payroll
- ☐ Monitor and train volunteers
- ☐ Readiness supports
- ☐ Other ______________ (explain)

Metrics should be specific and relate to individual services offered. Organizations must be able to track baseline and ongoing metrics to show cost savings for providers. For each service selected, applicants must detail:

  - Proposed metric(s) for [service] include: (50 words)

    - Explain your plan for baseline and ongoing data collection and analysis for [service]. (50 words)
- Describe the alignment between the identified barriers and needs for ECE providers in your target region and the services proposed. (200 words)

Hub Operations

- Explain the proposed governance structure for your Hub. (150 words)
- Explain the staffing model necessary to operate your Hub. Staffing models should maximize access to needed expertise and minimize cost. Considerations for your staffing model include:
  -can your organization's existing staff, consultants and subcontracts with other organizations be leveraged?
  -do you envision staffing from existing personnel, or the recruitment of new staff?
  -how would you identify staff to manage services (current or future)? (200 words)
- Describe the membership composition needed to operate your Hub. Include details such as ideal number and type(s) of provider, as well as characteristics or experiences that would be beneficial (e.g. member of early childhood coalition). (150 words)

Technology

All shared service Hubs must offer a technology solution to support provider operations and data collection to track business metrics that will show the impact of Hub participation.

- Describe your organization's current technology infrastructure. What tools and resources does your organization currently use to manage operations, track revenue/expenses, maximize collections, manage reporting to funders, etc.? (200 words)
- Explain your proposed Hub technology solution(s). Please note that your technology solution should facilitate implementation and deliver cost savings for the services your Hub offers. (200 words)

Member Recruitment

- Describe your organization's marketing infrastructure. What tools and resources does your organization currently use for communication and marketing tactics to ensure you reach your intended audience? (200 words)
- Explain the pitch your Hub will offer to potential members. Consider promises such as "Through Hub membership you will _____" or "Through Hub membership you will no longer _____." (50 words)
- Describe the approach to ongoing marketing for your Hub. (200 words)
- Identify 5-15 initial members your Hub could target for membership. Include information on each provider such as name, type of care, city, county, enrollment, relationship with Hub, target service and expressed interest in joining a Hub.

Budget

Applicants may use the sample provided on the grant webpage at earlylearningin.org/stronger-together or provide their own format. Budgets must address both the launch implementation (funded by grant) and ongoing operations (funded by membership). Components of the budget must include:

-itemized expenses and revenue for initial, year 1, and year 2

-staffing plan and allocation

-narrative explaining all personnel and other expenses

Feasible budgets will demonstrate understanding of these considerations:

-staffing plan is aligned with service menu

-staffing plan effectively uses percentages of existing staff at Hub organization

-staffing allocation increases in alignment with projected membership demand

-cost per member is reasonable based on CCSM licensing fees paid by Hub and based on services that members receive

-cost per member decreases over time indicating that Hub sustainability through membership growth is achievable

Timeline

Awarded organizations will have 12-18 months to expend funds in support of their Hub launch.

- Describe your detailed timeline to launch your Hub. Include key milestones such as hiring, training, marketing, anticipated launch, etc. (200 words)

Sustainability Plan

Stronger Together grants will support the launch and implementation of a shared service Hub. These Hubs are expected to continue operations beyond the timeline of the grant.

- Explain how your proposed Hub will sustain operations beyond launch. (200 words)

THIS IS A REQUEST FOR INFORMATION (RFI) ONLY;
THIS IS NOT A FORMAL BID SOLICITATION
NO AWARDS WILL RESULT

RFI for Child Care Data System

The State of Missouri is seeking information from the vendor community to better understand the options for and availability of software as a service that has the capability to enhance or replace the current Child Care Business Information System.

1.1 Current Contract Information:

1.1.1 A current contract exists for some of the services identified in this RFI. A copy of the contract can be viewed and printed from the Division of Purchasing Awarded Bid & Contract Document Search System located on the Internet at: http://oa.mo.gov/purchasing/bidding-contracts/awarded-bid-contract-document-search. In addition, all proposal and evaluation documentation leading to the award of that contract may also be viewed and printed from the Division of Purchasing and Awarded Bid & Contract Document Search System. Please reference the Bid number RFPT30034901700002 or the contract number CT170002001 when searching for these documents.

a. State expenditures – The Missouri Accountability Portal (MAP) located on the Internet at: http://mapyourtaxes.mo.gov/MAP/Expenditures/ provides financial data related to the purchase of the services under the contract. Be sure to read the information provided in the links to "Site Information" and "Disclaimer". Then search by the contract number shown above when searching for the financial information.

1.2 Accuracy of Background Information:

1.2.1 Although an attempt has been made to provide accurate and up-to-date information, the State of Missouri does not warrant or represent that the background information provided herein reflects all relationships or existing conditions related to this Request for Proposal.

These proposed characteristics / requirements for these services include, but are not limited to:

- Subsidy Child Care Time & Attendance
- Subsidy Provider Payment process
  - Payment Calculator
  - Remittance Notice
- Subsidy Benefit Management
  - Child Care Case Management for Income Maintenance children
    - Web-based Recipient Application
    - Application Processing (approval, denial, withdrawal)
    - Change in Circumstance adjustments
    - Child Care authorization to Provider
    - Renewal or Re-Application
  - Child Care Case Management for Protective Services children

        - Child Care authorization to Provider
- Provider Management
    - Application for Registered or Licensed Provider
    - Inspections & training tracking
- Child Care Provider Search
- Subsidy Claims
    - Recipient & Provider Claims
    - Program Integrity
    - Welfare Investigations
    - Fraud Prevention
- Interfaces with other existing systems
- Cloud – 405 compliant
- Responsive with smart devices

In response to this RFI, vendors may provide high level overviews of their solution, however, the state seeks sufficiently detailed information in order to be able to understand the full range of services available. Additional items of interest include:

- Connectivity / bandwidth requirements and supported configurations and solutions.
- The availability of the services through competitively bid purchasing contracts available to the State of Missouri.
- Any special considerations or solutions available for simplifying and optimizing the ability to obtain information from VDIs, mobile devices or PCs in regards to user work activity.

The State of Missouri now has approximately 30,000 active children and 2,500 active providers within the Child Care program. Proposed solutions needs to be designed to work with/in an environment at least this size. Responses and information/material submitted must be non-proprietary and non-confidential. Be aware RFI responses are considered an open record under section 610.021 RSMo after/if an RFP is issued.

To ensure full consideration, vendor responses must be emailed to Angela Sutton on or before 5:00 pm (CST), March 18th 2022. Responses must be emailed to Angela.Sutton@oa.mo.gov and Julie.Bussone@oa.mo.gov should contain the subject line: Child Care Data System RFI.

If you should have any questions, contact Theresa Kelly at Theresa.Kelly@dese.mo.gov. I sincerely appreciate your interest in this important service for the State of Missouri.

Sincerely,

DEPARTMENT of EDUCATION
Louisiana Believes

Child Care Management Software Initiative
Request for Applications

Statement of Purpose

The Louisiana Department of Education (LDOE) is offering an exciting, new opportunity for Child Care Management Software (CCMS) companies to support even more early learning centers in Louisiana. As the state builds out its data system (EdLink), early learning centers with eligible CCMS will be fully connected to EdLink through the CCMS (Spring 2022), enabling Louisiana to capture live vacancy data, enabling more streamlined subsidy transactions among the many other benefits of these products. As early as Fall 2021, early learning center providers will be able to access subsidized subscriptions on automation platforms, to incentivize their use of CCMS products.

The CCMS Initiative will subsidize Type III providers' first year of a subscription to a CCMS that meets certain criteria, including a requirement that the CCMS is connected to the state's EdLink data system as early as Spring 2022 to receive subsidy information. In order to support this initiative, the LDOE plans to create a Child Care Management Software Guide that will give an overview of all eligible products that can be used by child care providers to select the CCMS that best meets their needs. Providers who purchase a subscription to an approved CCMS will be eligible to have up to 80% of their expense (up to $800) reimbursed through this initiative. The CCMS Initiative program and guide will be similar to the Child Care Curriculum Initiative.

The Request for Applicants (RFA) is for CCMS vendors who are interested in completing the steps necessary to be listed as an approved CCMS vendor in the Child Care Management Software Guide.

Application Process

Applications will be accepted from CCMS vendors who sell software subscriptions and provide technical assistance to support the effective use of their products. The LDOE will conduct an initial review to ensure submissions align to the description of need. The LDOE will then review applications to ensure criteria for inclusion into the Child Care Management Software Guide is met. Organizations that meet established criteria will be notified through email of application approval and eligibility to be included in the Child Care Management Software Guide. Early learning providers will be provided with assistance from the Department to effectively utilize this guide. Organizations that do not meet eligibility criteria will also be notified.

All applications will be submitted via email to shallan.jones@la.gov. Applications are May 7, 2021 at 5:00 pm CST. Applications will be accepted on a rolling basis, and applicants can submit the application at any time. For inquiries about the application timeline (below), email shallan.jones@la.gov.

Application Requirements

The application requires information about:

- products and services from the CCMS
- printed resources
- recorded product demos
- depth of technical assistance and new user training
- willingness and interest in enabling alignment with the state's database system via API

Evaluation Criteria
Each application and accompanying materials will be scored according to criteria set forth by the LDOE's Center Supports Team.

All determinations of whether or not an application meets these evaluation criteria will be indicated on a "Pass / Fail" basis. The LDOE will interpret these evaluation criteria as indicated in the table below.

Evaluation Criteria	How the Evaluation Criteria will be Assessed: Evaluation Sub-Components
Indicator I: Vendor's products and services align with program goals.	1a) Vendor's products and services align with the CCMS Initiative's purpose in at least one area of specialized support. 1b) Vendor has relevant experience to conduct the work, including supporting providers with a wide range of needs. 1c) Vendor has a strong reputation and/or favorable reviews.
Indicator II: Provider Supports	2a) Vendor offers a more than 60 hours of customer service supports that are available in various formats each week (chat, phone). 2b) Vendor provides demos and easy-to-understand resources that support self-paced learning. 2c) Vendor offers live training events for new users on a regular basis (at least monthly). 2d) Vendor is willing to support training of LDOE staff or their partners who are onboarding new providers.
Indicator III: Software Enhancements	3a) The software has cloud-based features. 3b) The product offers completely automated tuition payment options to support the fiscal viability of early learning centers. 3c) The product offers documentation management options for student and staff records. 3d) The product offers a fully integrated and complete parent engagement solution to support and enhance two-way communication. 3e) The product offers contactless and secure check in/out functions. 3f) The product offers staff management solutions to support regulatory requirements (staff-child ratios) as well as payroll management.
Indicator IV: Alignment with the LDOE database	4a) The vendor currently has the capacity to patch to the state's emerging database system, OR 4b) The vendor is willing to code for that ability.
Indicator V: Vendor Rates	5a) Proposed rate(s) is/are at fair market value considering material, activities, and qualifications.

Evaluation Process Notes

The LDOE evaluation team will evaluate each application based on the evaluation criteria.

- Applications must “pass” all five eligibility standards to be accepted. In order to “pass” a standard the vendor must meet each sub-component of that standard.
- A vendor’s application package will be accepted and listed as an approved vendor in the Child Care Management Software Guide if:
  - the application achieves a “pass” on all five evaluation criteria; and
  - the application conforms with all of the RFA’s administrative and legal requirements.
- No appeals will be considered at any stage.
- Unsuccessful applicants are encouraged to submit new proposals during future RFA application processes.

RFA Selection Processes

The table below outlines the RFA selection process for the Child Care Management Software Guide.

	Child Care Management Software Initiative RFA Process	Application Window 1
Step 1	CCMS Vendor applicants submit an application via email to shallan.jones@la.gov	Closes May 7, 2021
Step 2	The LDOE schedules and convenes review panels to review applications. Rejected applicants receive feedback.	Reviewed by May 14, 2021
Step 3	Approved applicants will be added as approved vendors in the CCMS Initiative Guide.	Within 7 days after approval (May 21, 2021)
Step 4	Approved applicants will present a short demo of their product during an LDOE live webinar, also to be recorded to be shared at a later date.	June 2, 2021

Applications will be accepted on a rolling basis, and applicants can submit the application at any time. The timeline for each application window is listed above. For inquiries about application windows email shallan.jones@la.gov

Child Care Management Software Initiative (CCMSi) Application for Vendors

Name of Company/Vendor:		
Name of individual submitting the application and title:		
Physical address of company:		
Business EIN:	Telephone:	Email address to contact you:
General subscription length (monthly, annual, etc):		
Annual subscription cost:		
Are there any additional cost to fully implement software (peripheral equipment and costs):		
Are you willing to provide an informational webinar (live or recorded, TBD) on your product?		
Will you be willing to provide either a live or recorded demo of your product (7 minutes maximum) on June 2, 2021?		

Indicate the functions of the product and customer service model and provide a description of how this criteria are met.

Check if yes	Criteria	Vendor evidence	Is this an additional cost? What is it currently?
❏	Does your product offer 60 hours or more of customer support? (chat/phone)		
❏	Does your product provide demos and easy-to-understand resources that support self-paced adult learning?		
❏	Does your company offer live training events for new users on a regular basis (at least monthly)?		
❏	Is your company willing to support training of LDOE staff or their partners who are onboarding new providers?		
❏	Does your product offer cloud based features?		
❏	Does your		

	product offer completely automated tuition payment options?		
❑	Does your product offer document management options for student and staff records?		
❑	Does your product offer a two-way communication system to support parent engagement?		
❑	Does your product offer secure check in and check out functions?		
❑	Does your product offer staff management solutions to support regulatory requirements such as staff-child ratios as well as payroll management?		
❑	Does your company have an existing API patch OR is your company willing		

	to allow for this patch? (please indicate to the right)		

I attest that the above assurances and evidence provided accurately reflect the capacities of the product I represent.

Signature of Vendor Contact: X	**Date:**
Signature of XX: X	**Date:**

OFFICE USE ONLY

Date Received: _____________ Date Reviewed: ____ Date Reimbursed:_____ ______ Amount of Reimbursement:___