Project: Fort Bend LINC

Request for Proposals

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INTRODUCTION

Overview: The George Foundation

The George Foundation invests in Fort Bend County, Texas to enhance our community and the quality of life of those in need. As a location-based grant maker, our funding is focused on efforts specifically benefiting the people of Fort Bend County. Each year, the Foundation invests roughly $20M in our local community through grants to local nonprofits, scholarship opportunities for aspiring local students, and special programs for the community. The Foundation strives to positively impact the lives of our neighbors.

The Foundation's grantmaking furthers our mission to partner with the community to leverage the Foundation's resources to positively impact Fort Bend County and its residents. Grants are made in pursuit of our vision of a thriving nonprofit sector that addresses critical community needs, enhances the quality of life and provides opportunities for Fort Bend County residents.

Background: Financial Assistance System (Fort Bend LINC)

As part of our Strategic Plan, the Foundation launched a concerted effort to work alongside our grantees to tackle a critical issue in our community - housing stability. Through a human-centered design approach, the initiative aims to make it quicker and easier for people in our community to apply for and receive financial assistance (primarily rental assistance). The goal is to keep vulnerable families stably housed. Through multiple sessions with various stakeholders (nonprofits, landlords, eviction court judges and clients themselves) we have developed a blueprint for a new system of care for rental assistance.

We are now in the process of designing a technology platform to make it easier for people to connect to resources in a way that is efficient, responsive and dignified.

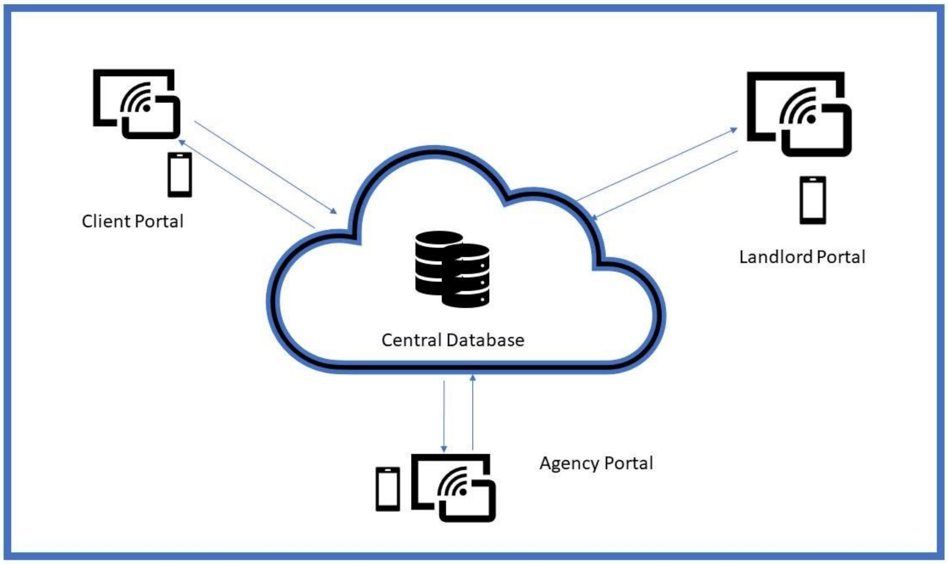
A CORE Workgroup comprised of local leaders with expertise in financial assistance delivery and community engagement has provided input into the system's design. The system will be managed by a designated lead nonprofit entity along with funding from The George Foundation.

Vision for the Financial Assistance System (Fort Bend LINC)

The community desires a system that will:

- Act as a comprehensive tool to empower residents throughout Fort Bend Co. to self-select into services from partnering nonprofit agencies, public sector departments and houses of worship.
- Enable agency users to track client progress and measure programmatic impact.
- Improve the client experience in accessing financial assistance and other supports.
- Include easy-to-understand analytics to enable the lead agency and collaborative partner agencies to monitor and improve:
  - Program pipeline: Monitor which services are used at what scale to strategically build the right agency and program mix and enable services to be delivered efficiently.
  - Program orchestration: Understand common links between services to enable clients to navigate into and through services easily.
  - Program gaps: Identify service gaps and challenges in real time to support clients in achieving end goals.
  - Stakeholder communications: Ensure quick and transparent communications between client, agency, and landlords.
- Possible Integration with existing systems utilized across service provider partners (public sector, nonprofit and faith-based service providers), ensuring inputs, data and efforts are not duplicated.

Operational Strategy: Key Principles of Financial Assistance System (Fort Bend LINC)



The Key Stakeholders in the Financial Assistance System (Fort Bend LINC)

The key stakeholders and end users are:

- Clients (individuals and families requiring financial assistance to remain stably housed) – “external” end-users who can register and sign-in to the system from a public web interface to manage required needs as state below.
- Landlords (multi-family complexes and single-family rentals) - “external” end-users who can register and sign-in to the system from a public web interface to manage required needs as state below.
- Agencies (participating nonprofit agencies, public sector departments and houses of worship offering aid to clients) – “internal,” end-users whose registration and system access is more tightly controlled and occurs through a non-public interface: it should be noted that key contacts at lead agency/ies (i.e. “agency administrators”) will manage end-user based system “administration” functions by means of role-based user access: these functions may include but are not limited to managing available assistance resources, agency/user/role-based user registration and access, advanced querying and report building, etc.

The Central Database

A centralized data platform shall maintain all client, agency, and landlord data. It is essential that this database maintains a single, coherent, and complete view of stakeholders, particularly clients. This data will include client demographics (PII), behavioral data (actions taken on apps or portals, chat bots, etc.), and any other informational and transactional data between stakeholders via the proposed system.

The central data platform is envisioned as a web-based third party platform (may comprise of customized prebuilt CDP/ CRM/ others) that includes robust role-based user access and authentication features along with ability to integrate and interact with custom web-based applications via web-based API's.

The data platform shall be the centralized hub for all real-time interactions for the web-based portals for client, landlord and agency. This database platform should be compliant with any data privacy, regulation and compliance requirements as required by State of Texas or federal regulations.

Web Portals ("Front-end")

A web-based interface that allows stakeholders to input, manage and retrieve information regarding Rental Assistance and other associated services. It connects to a central database via web-based API's. There shall be three application portals based on the type of end-user/stakeholder. The following web based front end (Portal) needs to be optimized for desktop/laptop as well mobile phone access. The system will be developed in English, with the addition of other common languages used by stakeholders to possibly be integrated in future iterations.

The Client Portal

> The Client portal will allow clients to search for information about and apply for Rental Assistance and other associated services from a variety of agencies through a streamlined, common application for services. It will allow clients to easily upload required application documents via their mobile devices. It will connect to the central database shared by all participating agencies in Fort Bend County. The portal will receive and send notifications regarding the client's application status. The client may receive and send texts to agency representatives regarding their application and services. Clients will be able to share official consent (with signature) at defined inflection points in above work

flow for releases of information (ROI) to receive services from participating agencies (among other purposes).

The Landlord Portal

The Landlord portal allows landlords a simple and convenient way to provide the information needed by agencies to support a client's application, while ensuring the security of their sensitive personal and banking information. It connects to the central database shared by all participating agencies in Fort Bend County. This system can also send text notifications to landlords to update them on the progress of their tenant's application for financial assistance. It includes an area that shows summaries of their tenants' current and present usage of financial services and other helpful information. If clients are approved for assistance, the platform will allow landlords to be paid efficiently.

The Agency Portal

The Agency platform shall allow agency staff to view and interact with the central database shared by all participating agencies in Fort Bend County. This database can also send text notifications to clients and landlords to update them on progress of applications and to follow up with them after receiving services. Agency staff will be able to send messages to and receive messages from clients, landlords, and their colleagues at other agencies from within the portal. The database will store profiles of clients, landlords, and their properties. Documents will be stored with these profiles to reduce delays due to lost or missing documents. Agency staff will be alerted when they receive new applications, which they will be able to review, approve, and pay from directly inside the portal.

REQUIRED TECHNICAL SPECIFICATIONS

Applicants are encouraged to provide architectural diagrams and specifications they envision for the proposed system. The following are the functional features as required by the web portals as per wireframes developed for functionality of each web portal.

- All the three web-based customer portals shall provide user authentication and access control (as defined in *Key Stakeholders* section above)
- Optimized for most mainstream Internet and browser-enabled computing devices, including desktop/laptop/tablet and mobile phone
- Responsive for real time interactions
- Integrated Chat bot feature
- Data security and compliance to data privacy laws
- Integrated Text/ SMS and Mobile notifications
- Multilingual selection

The Client Portal Features

Pre-Qualified Service Options

- Filter the list of services available to each client based on their answers to a questionnaire, and:
  ○ Their ZIP codes
  ○ Real time updates to verify service providers still have funds available
  ○ Explore using the client's approximate location to rule out enquiries too far away from the zip entered (outside USA, at least)
- System looks up the database of other service providers to find the #ID provided by the client.
- Provide filtering tools for clients to see other options that would be available if they changed their screening criteria.
- Allow clients to join a waitlist if there are services available in the future that they are interested in and eligible for

Immediate Help Options

- Filter the list of food services and other immediate financial help available to each client based on their:
  ○ ZIP code
  ○ Preference for delivery
  ○ Answers to application questions

- Requests for available services trigger transfer of digital vouchers
- Show map of service provider locations
- System can tally results of a questionnaire and make the recommendation for a consultation with mental health specialist if client responses to questionnaire signal immediate crisis.

Universal Application

- User filled fields of personal info are sent to the database and stored in a profile specific for each client.
- Any information inputted by the client can be recalled if they don't finish an application. The cached information will be tied to their phone number for recall
- The system automatically assigns a client ID# to each profile (only for agency use)
- Users can take photos of any necessary documents needed for their application from their mobile phone and upload them with their application.
- Client documents are stored permanently with their profile on the database.
- System can access client's bank records to grab statements or IRS to grab previous tax filing if client provides permission
- Application forms can be downloaded and/or printed to be completed by hand. Paper application forms are partially pre-populated based on information provided by user to date
- Clients can request their application confirmation number to be texted to them for future reference

Client User Experience

- Clients can log back into their portal at any time to:
  - Check on the status of their current application
  - Learn about other services they may be eligible for
  - Update their profile information
  - Review FAQ explanations and send questions about agency services
  - Review previous history of financial service usage
- Client can create a shortcut on their mobile phone desktop to provide convenient access to their portal.

Automated Text Notifications for Clients

- Login verification code
- Confirmation of food delivery
- Confirmation of application completion
- Notification if agency response will be delayed longer than pre-configured timeline

- Application confirmation number
- Confirmation that agency(ies) received landlord info
- Confirmation that my application has been approved.
- Notification that a check has been sent to client's landlord
- Notification that the funds from my landlord's check have cleared their bank account
- Notification that client's application is denied.
- Notification that landlord is not cooperating after pre-configured time
- 3 month, 6 month, 12 month follow up messages
- If client cancels their application - auto-notification confirms the cancellation

Security Features

- Text verification for logging in to portal
- Encrypted messaging and storage (to protect SSN and bank account details etc)

Miscellaneous Features

- Add appointments with Navigators or agency staff to client's calendar, if they provide permission
- System can connect to utility providers to learn what payments are owed on a client's account and make digital payments through utility provider's portal
- FAQ section
- A Chatbot to search for other information (programmed to recognize common search words)

The Landlord Portal Features

Information Forms to Support Client Applications

- Some of the fields are pre-populated based on the information provided by clients.
- If a landlord already has a profile in the system for the property a client is residing in, landlords are shown their most current information to confirm or change
- ACH direct deposit information can be provided by uploading a photo of a voided check from their camera phone
- The system can communicate with the IRS website and retrieve w9 information if the landlords provides their permission
- W9 information can be uploaded by landlords to the portal by taking a photo of their w9 on their camera phone

Landlord Portal

- Landlords can log back into their portal at any time to:

  - Check on the progress of all current tenant applications
  - Review and search a record of all historical tenant applications
  - Review FAQ explanations and send questions about agency services
  - Review and update the profile information for multiple properties
  - Refer a tenant to the agency portal for agencies to contact the tenant about financial services
- Landlord can create a shortcut on their desktop to provide convenient access to their portal

Automated Text Notifications for Landlords

- Link to application section of portal
- Verification code for portal log in
- Reminder of outstanding information needed from Landlord.
- Application approval OR
- Application approval and direct deposit payment
- Check has been written.
- Check has been sent.
- Request for confirmation that check has arrived.

Security Features

- Text verification for logging in to portal
- Encrypted messaging and storage (to protect SSN and bank account details etc)

The Agency Portal Features

In addition to common web portals and features already discussed, Agency staff will be able to send messages to clients, landlords, and their colleagues at other agencies from within the portal. The database will store profiles of clients, landlords, and their properties. Documents will be stored with these profiles, to reduce delays due to lost or missing documents. Agency staff will be alerted when they receive new applications, which they will be able to review, approve, and pay from directly inside the portal.

Security Features

- Daily scans for duplicative accounts - scan by similar names, address, DOB (If available)
- Suspected duplicate accounts are tagged for specialists to review and remedy
- Encrypted messaging
- Case notes are searchable. Can be programmed to highlight certain one-time events if duplicated, e.g., "my mother died"

- Agency administrators can designate different levels of access privilege for agency staff who don't need access to certain client and landlord information (i.e., social security numbers, tax ID numbers, bank accounts, etc)

Automated Notifications for Agencies

- New application awaiting approval.
- New application awaiting payment.
- Reminder an application approval is outside the approval time that was communicated to client
- Reminder an application payment is outside the standard timeframe pledged by agency
- Reminder to follow up with landlord.
- New message notification
- Client follow-up reminders
    - Standard interval (3m, 6m, 12m)
    - Custom interval
- Reminder of upcoming rent late fees
- Reminder of upcoming eviction date
- Reminder of upcoming court case following an eviction
- Notifications of updates from other agencies to their services, eligibility criteria, or funding status
- Notification of a referral being received.
- Warning that your agency funding is about to finish.
- Warning and prompt to review possible cases of profile duplication or fraud

Miscellaneous Features

- System retrieves landlord’s W9 from public database to verify the ownership of the client’s rental property
- Daily automatic verification of landlord's w9 on database portal. Red-flag if not current to verify staff to review
- Trigger auto-payment to landlords directly from system through ACH direct deposit
- Automatically send approval message to initiate other payment methods.
- Communicate with the portals of utility providers for payment and/or logging of payment receipts in the system
- Scheduling tool will recognize where the client is in the application process and match them with the right help accordingly. Agency staff would receive tagging so that they know where client is in process so they can prepare accordingly.
- System will monitor and display real-time updates of the remaining funds for every service, as well as estimates of when funds will be exhausted based on trending usage

- Bot/automated feature to scan documents and verify if the client has in fact uploaded the correct document that was requested of them
- Bot/automated feature to scan and flag potential duplicates in the system before record submission.
- The database, case notes, and all communications are searchable by a keyword search and various other information categories.
- Individual users will be able to create customized reports to display various criteria of interest, in addition to those created using pre-configured report criteria.
- Users can change their settings to “out of office” and re-route messages to other staff during that time.
- Explore ways to send text message updates without the cost to the client.
- Ability to manually red flag client / landlord profiles allowing other agencies to see red flag status and corresponding notes for why they’ve been flagged

PROPOSAL COMPONENTS

RFP Applicants are asked to address the following in detail in their proposal:

Front End Pages

1. What is your experience building front-end user workflow pages? Generally, and for the social sector? Note: TGF has collaborated with a partner to develop detailed wireframes of functionality. Visual Design work would be needed to translate the existing wireframes to the finished interface design across multiple device platforms. The UI may need enhancements in terms of customer experience and usability of the portal; currently the wireframes have been designed keeping functional requirements in perspective.
2. Describe front end programming language(s) you intend to use (i.e.: React, Angular, JavaScript, CSS, etc.).
3. Describe the webservice API layer and any hosting related design with respect to choice of the central database.

Back End Data Layer

All client, agency, and landlord data should be stored in a centralized data platform. For this database to be effective, stakeholders, particularly clients, need to have a single, coherent, and complete view of them. The proposed system will collect data regarding client demographics (PII), behavior (actions taken on applications or portals, chat bots, etc.), and any other information or transaction involving stakeholders.

Using the central customer data platform, third-party platforms can be customized for faster development (such as custom CDPs, CRMs, and others). Web-based APIs can be used to integrate with custom web based applications as well as to provide robust user authentication and access capabilities.

All Realtime customer interactions on the web-based portals for landlords, agents and clients will be conducted through the central Customer data platform.

4. As required by the State of Texas or federal regulations, this customer database platform should comply with all data privacy, regulation, and compliance requirements during storage as well as transformation or transfer of data to

integrating portals. What is your experience designing and writing specs for how data flows into reports? Generally, and for the social sector?

5. What is your experience in ingesting, normalizing, and consolidating data from separate third-party systems/sources (CDP/ CRM/Custom/ Others)? Generally, and for the social sector?

6. Can you confirm your ability to extract data from the following platforms (e.g., Apricot, Salesforce, HMIS, etc.)? Please give specific examples.

7. Have you connected to these platforms directly with an API or used these platforms .csv exports? Please give specific examples.

8. Describe the technical architecture you intend to use to build the back-end data layers (i.e.: Python, MySQL, Flask, etc.)?

Data Governance

9. What is your experience implementing data governance rules? How would you ensure quality/audit of rules implemented?

10. What is your experience in integrating, through APIs, to outside tools that will house resource data governance rules?

11. Describe your experience with user acceptance testing, quality control frameworks, de-identification/ PII experience, and data deduplication.

12. Data Security - Compliance. Transmission PII - Legal
    - Describe Role based User access and authentication features. Multi Factor Authentication etc.
    - Any hosting requirements, concerns etc.
    - Design for Data redundancy or Backup if needed.
    - Encryption/ security via transit/ storage and backup of Data

Maintenance, Support & Other

13. How do you customize your solutions for individual clients? Please provide examples.

14. How do you leverage flexible platforms and design to empower your clients to manage day-to-day administrative functions--or even customizations--on their own?

15. Describe how your company has demonstrated a commitment to supporting data sharing across non-profit services (e.g., homelessness, domestic violence, substance abuse) and across sectors of business.

16. Provide details on relevant experience within Greater Houston and/or in other jurisdictions that illustrate your capacity to successfully complete a project life cycle from design to full implementation.

17. Describe the team composition that would be assigned to develop and support this project. Please include resumes for each project team member that will support this effort.

18. How do you customize your solutions for individual clients? Please provide examples.

19. How does your company support the product's end users after completion of an initial phase?

20. What type of implementation services do you offer after a solution has been designed?

Timeline, Budget, and Other

Budget

Proposal should include a detailed estimate of specific cost for design, testing and implementation of the product, including cost implications related to end-user access Budgets may be submitted as narrative or as an attachment.

- Wireframe mockups of portal functionality developed so far can be made available on request. The selected development team will be expected to provide complete visual design based on the wireframes and enhance the usability wireframe for usability and visual improvements as needed.
- Applicants are expected to provide estimates and budget for post development warranty and continued support of the product in the proposal.

Development Timeframe
Proposals should include a timeline with project milestones that include delivery of the final product by 06/30/2024, with three tiered cycles of refinement.

Intellectual Property
The vendor will deliver all source code and data excluding third party applications, software design, configuration, and operational documentation to TGF. These materials will become the property of TGF.

CORPORATE PROFILE

Along the architectural diagram and related estimates, budget for development, testing, warranty and continued support. Please provide a detailed profile for your company to include the following:

- Company name
- EIN
- Headquarters address
- Contact information for RFP.
- Website
- Primary products/services
- Primary/strongest client verticals
- Years in business
- Number of employees
- Number of employees in technical support
- Number of employees in project
- Key business partnerships
- Gross revenue
- Capabilities statement
- Technology platform experience
- Pricing & contracts
- References: Proposals are asked to include 2-3 client references that can speak to their experience through a complete project life cycle. (If desired, you may upload a recommendation letter.)

Submission Process & Key Dates

An initial Letter of Intent (LOI) is due by Mon. 04/24/2023 (5:00pm CST). Letters should be sent electronically to Quynh-Anh McMahan, Chief Grants Officer, qmcmahan@thegeorgefoundation.org. Please note "Fort Bend LINC LOI" in subject line. Upon review of the LOI, vendors will receive directions on how to submit their proposals.

- Complete proposal submissions are due by Mon. 05/15/2023 (5:00pm CST).
- Vendors selected to advance to Phase 2 of the evaluation process will be notified electronically by Wed. 05/31/2023 (5:00 CST). Selected vendors will be invited to Phase 2 of the RFP evaluation process which will include an interview and demonstration of the proposed technology.
- Final award notification will be sent through official electronic correspondence no later than Fri. 06/16/2023.

Selection Process

Proposals will be evaluated based on the following criteria:

- Demonstrated capacity to create key technical requirements for front end/back-end development.
- Demonstrated experience with incorporating data governance to support responsible data sharing practices.
- Demonstrated experience and capacity to successfully develop the tool with strong relationship management.
- Demonstrated understanding of the goals of the Integrated Client Journey.
- Demonstrated commitment to the greater Houston community.
- Demonstrated ability to stay within budget throughout a project lifecycle.

Confidentiality Statement

All RFP information is considered confidential and intended only for use by responders. No information included in this document, or in discussions related to TGF Rental assistance vendor selection effort, may be disclosed to another party, or used for any other purpose without the express written or verbal consent.

Questions

Please contact Quynh-Anh McMahan, Chief Grants Officer, The George Foundation, with any questions about this RFP: (281) 342-6109 or qmcmahan@thegeorgefoundation.org.