



Summary of Questions and Answers

RFQ #819 – OECE Child Enrollment & Payment Data Systems Management  
Pre-Proposal Conference on September 20, 2018, 2018 @ 2:00 pm  
Written Questions on or before September 24, 2018 @ 5:00 pm

Pre-proposal Conference Human Services Agency Representatives:

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**Questions and Answers:**

1. **Question:** Are you looking to build a solution from scratch or are you looking for a solution that is already existing?

**Answer:** We are looking to build upon a solution that already exists and will be the core of the new data system but customization and development will most likely be needed.

2. **Question:** The RFQ addresses children age 0-5. What consideration has been made for children 5-13 years old?

**Answer:** OECE was created for the intent to focus on the 0-5 age spectrum. The Department of Children, Youth, and Their Families (DCYF) focuses on school-age children, teens and transitional age youth up to age 24 and their families. They are one of our partners. However, we do provide financial assistance for siblings of children in our funded network up to the age of 12.

3. **Question:** The second Minimum Requirement on page 22 references Section 13. Is that in reference to Appendix A?

**Answer:** Yes, the security guidelines are actually located in Appendix A.

4. **Question:** Do you have the number of children that will be served?

**Answer:** We currently provide funding that supports about 8,000 children across all of the funded early care and education programs.

5. **Question:** Who are the 3 people that will be on the review panel?

**Answer:** We can't share that information at this time.

6. **Question:** Do you currently have an e-Signature solution in place? Are you looking for an out of the box solution?

**Answer:** We currently have e-Signature capabilities in our Cocoa database. We would want e-Signature solution in place by the time we launch the data system

7. **Question:** You mentioned the development of a new centralized waiting list. Is that something that needs to be incorporated into the new system?

**Answer:** We have put a lot of development into a new centralized waiting list system and the current thinking is that we want the new data system to be synchronized with the new centralized waiting list. We are always open to improving all of our systems. Our goals are to streamline processes and reduce administrative burden for our ECE program partners and system partners.

8. **Question:** Are you looking to have the system generate invoices and receipts to the parents?

**Answer:** Our program stakeholders would find such features useful. In the reports section of the scope of work, we have not yet identified what specific reports would be needed. Identifying the specific reports to be included is something OECE plans to involve its ECE program and system partners in helping to identify and finalize. .

9. **Question:** Is there a requirement that the vendor do check writing?

**Answer:** No, check writing will be done by OECE's system partners.

10. **Question:** Will the new system require an API for Head Start programs?

**Answer:** We do see a need for the system to be flexible enough to address the needs of incorporating data from our three Head Start agencies. Section 3.5 *Data synchronization of other data* would incorporate the need to integrate data from our Head Start agencies.

11. **Question:** Will the system need to work for families that are enrolled in the OECE program but are not a subsidized family?

**Answer:** Yes, the data system will need to capture data for all families enrolled in OECE-funded ECE programs.

12. **Question:** Is mobile device compatibility a required feature of the data system?

**Answer:** It is a required feature that the data system works from any mobile device. It is a desired feature that the system be mobile-friendly or use responsive design so it is easy to navigate from any mobile device, such as a tablet or phone. The portions of the system that will most likely be accessed via mobile device would be enrollment information, e-signature and attendance, and child assessments.

13. **Question:** Is the plan for San Francisco to continue using WELS?  
**Answer:** Yes, our partners at First 5 San Francisco have a contract with WELS but have been exploring other options in the recent past. The current plan is to continue with WELS.
14. **Question:** How much QRIS data is needed in terms of the synchronization with this system?  
**Answer:** This is something we will discuss and want to work out with the selected vendor and our partners.
15. **Question:** Should the solution have the ability to pull data from all the legacy systems to prepopulate forms?  
**Answer:** We will be working with the selected vendor and our partners to determine what legacy data should be migrated into the new system.
16. **Question:** After integrating the legacy data, what will happen to the legacy systems once the new system is in place?  
**Answer:** Our hope is that if we successfully adopt a new data system, that will reduce the number of systems in use that have duplicate information. OECE's system partners directly manage the current use of some of the systems, so it will depend on the actions of OECE and its partners.
17. **Question:** Will the new system have to provide all of the features of the existing legacy systems?  
**Answer:** We have consulted with our program partners and stakeholders and have received their input. In the RFQ, we have outlined the features and functions from the existing systems that we think are most needed.
18. **Question:** If we don't have cooperation from the legacy partners how successful will we be regarding the importing of legacy data into the new system?  
**Answer:** OECE will facilitate the process to work with system partners and legacy system vendors. We can explore contingencies in the selected vendor's contract related to cooperation from legacy stakeholders.
19. **Question:** What is the allocation of the budget parameters for the new system? Is there a publishable cost range for the proposal?  
**Answer:** We want to hear from proposers on the budget and development costs for the new data system. We would like to know upfront one-time costs vs ongoing costs.

20. **Question:** Should the budget reflect the term of the contract from March 2019-July 2021?  
**Answer:** Yes. This is outlined in the RFQ.
21. **Question:** Is producing a PRI for the Head Start program part of the requirements?  
**Answer:** This is not a requirement.
22. **Question:** Do we see anything happening in CSBG and Adult Services being a part of the expansion in funding?  
**Answer:** CSBG or Adult Services funding are not anticipated. OECE primarily administers local funding so do not have any expansion plans related to federal funding at this time. Expansion of local funding is possible, but not given, in the next few years.
23. **Question:** There is no mention of a parent user feature in the RFQ. Is this a required feature for the new data system?  
**Answer:** This is not a required feature. However, this feature would be of interest to many of our partners and we encourage proposers to mention that their system has this capability in their proposal.
24. **Question:** Where would additional features not outlined in the RFQ come into play regarding the evaluation criteria and selection?  
**Answer:** It would not come into play during the primary qualification but will come into play during the secondary process where our stakeholders will be viewing a demo and testing out the new system. During that time the stakeholders will be rating the products against each other.
25. **Question:** The child care centralized eligibility waiting list system that OECE is currently developing, did that go out through procurement or was it an internal decision?  
**Answer:** We went through a procurement program lead by the Mayor's Office called Start Up Innovation in Residency Program (STIR). This program partners technology companies with San Francisco County departments and other local government agencies to tackle challenges. This RFQ has been sent out yearly.
26. **Question:** When will a decision be made by OECE on who will be awarded the contract?  
**Answer:** We plan to have a decision by the end of the year or January 2019.
27. **Question:** When will the product be expected to go fully live?

**Answer:** We would like to launch by February 2020.

28. **Question:** Are audited financial statements required?

**Answer:** Please include 2 years of audited financial statements. If your organization is under the threshold of requiring a financial audit, please state that in your proposal.

29. **Question:** Does it hurt you during the evaluation if you are a for-profit vs a non-profit?

**Answer:** Not at all; however, the contracting process for a for-profit vendor is longer.

30. **Question:** Have you visualized what the system will do for the end user and what it will look like?

**Answer:** We have not. We have focused more conceptually on the functionality and the features needed.

31. **Question:** In Appendix B – Contract Templates, *Section 5. Software Development, Subsection a. Program Development* is based upon a waterfall approach. Our software utilizes the Agile methodology, where phase 2 and phase 3 are essentially integrated and continue in smaller sub-phases, with each sub-phase being reviewed and accepted by the users until all development is complete and ready for final User Acceptance Testing. Can *Section 5. Software Development and Section 6. Acceptance Procedure* be modified to reflect using the Agile methodology?

**Answer:** Yes it can be modified to utilize the agile approach. Deliverables and timeframes will need to be agreed upon with OECE.

32. **Question:** Under *Subsection g. Royalty Payments*, there are unspecified amounts shown that the Contractor would pay to the City. What are these royalty payments deriving from and are the amounts negotiable if the Contractor ultimately agrees to pay royalties?

**Answer:** These types of details would be worked out in contract negotiation, after the tentative award letter is issued.

33. **Question:** To what extent are the liquidated damage provision conditions in the contract negotiable? There are unspecified amounts for clauses present in the section regarding liquidated damages in the contract template. In the event that the liquidated damages are not negotiable, are these unspecified amount clauses open for discussion?

**Answer:** Liquidated damages are open to negotiation.

34. **Question:** Is the city open to including a Mutual Termination Without Cause provision?

**Answer:** A mutual termination without cause provision is open to negotiation, subject to certain guarantees to the City.

35. **Question:** What are your requirements for Disaster Recovery? What is the desired RTO and RPO? What are the distance requirements for the data centers?  
**Answer:** As stated in the RFQ, OECE is asking the Contractor to assist in developing a disaster recovery and business continuity plan. Determination of RTO, RPO, and distance requirements are expected to be part of that planning effort.
36. **Question:** Could you provide more detail about the desired features related to curriculum and lesson planning?  
**Answer:** OECE is interested in exploring features that will support our ECE program partners in increasing their positive impact on the children they serve.
37. **Question:** For the end user formula-based reports: Can you provide more details about how you envision these reports working, or is there an example that you can point us to? Do you want predefined formulas included in an export of results (e.g. sum of column z; average of column x divided by column y; etc.) or do you want to be able to enter a formula or multiple formulas when running the report and have the page respond to or incorporate that formula(s) and then be able to export those results?  
**Answer:** OECE and its system partners would supply the formulas, and the end users will run the reports. OECE anticipates the need to make changes to the formulas on an as-needed basis.
38. **Question:** How many different programs will be supported by this application/would it be used for and what are those?  
**Answer:** OECE's current estimate is that all of the programs in its funded network would use the system. OECE currently funds approximately 375 ECE program sites, and hopes to expand its network of agencies and sites in the coming years. The table in Section 1.1 *Creation of user accounts* outlines OECE's current thinking about user groups and estimates on the number of users in each of those groups.
39. **Question:** Do you need Multilingual Support within the application i.e. would you need the forms in Spanish and Mandarin also?  
**Answer:** Yes.
40. **Question:** Who bears the cost for the translation firms / experts i.e. getting the forms translated in other languages?  
**Answer:** The selected vendor.

41. **Question:** Will the data flow between the existing 5 applications and the new Child Enrollment & Payment Data Systems Management be bi-directional or will the data be only fetched in from the other systems?  
**Answer:** OECE is looking for the capability for bi-directional data flow between the data systems listed under Section 3 *Data synchronization, upload and integration*. At this time, OECE is looking for one-time data migration from legacy data systems.
42. **Question:** Can you share a Sample of DRDP assessment? If unavailable, please share the question types- single word responses, constructive responses, etc.?  
**Answer:** Please visit the Desired Results Developmental Profile website at <https://www.desiredresults.us/> for more information and samples.
43. **Question:** What is being rolled over in *Section 2.6 - Session & Class Information*: Is it Children data or just the Business Rules?  
**Answer:** Section 2.6 states that the new “system should include approaches to continuity for rolling over data from year to year.” OECE’s intent is to reduce administrative burden on ECE programs so that they do not have to re-enter child, schedule and enrollment information each fiscal year for children that are enrolled for more than one year, while also maintaining data quality. OECE is open to solutions to address this need.
44. **Question:** Are Application Screenshots included in the page count? (III.C.7 Submission Requirements /Content/ Data System)  
**Answer:** No.
45. **Question:** Does OECE currently provide an initial annual Not-To-Exceed funding allocation to participating providers based upon projected enrollments, historical activity, funding types, etc..?  
**Answer:** Yes, for some funding types OECE issues Funding Agreements that state the maximum amount that an ECE program can earn.
46. **Question:** Do the participating early care and education providers currently have to submit a budget to OECE intending their planned use of the funding provided by OECE? If yes, is there an approval process?  
**Answer:** At this time only SFUSD and the three Head Start/Early Head Start agencies are required to submit a budget to OECE for their planned use of OECE funding. OECE staff and then HSA Contracts staff review their budget for approval. All other ECE programs who receive funding from OECE are paid on a fee-for-service model.

47. **Question:** How often does OECE currently make payments to participating providers? Is there a structured way OECE makes payments by period: monthly, quarterly, etc. Does the payment period differ based upon type of funding?  
**Answer:** Most ECE programs are paid monthly through one of OECE's two subsidy administration contractors for all funding types, except for Annual Quality Grants which are lump sum payments in either the fall or spring. SFUSD is paid quarterly directly by OECE/HSA.
48. **Question:** Do participating providers currently invoice OECE to obtain payment, or are payments made automatically based upon attendance and other data inputs? If providers invoice, how do they currently invoice (mail, email, and electronic upload)?  
**Answer:** Most ECE programs do not invoice OECE or its subsidy administration partners. Those ECE programs are paid based on enrollment information. SFUSD and the three Head Start/Early Head Start agencies do invoice OECE using HSA's web-based contracting system, CARBON.
49. **Question:** Are providers currently issued one or more Purchase Orders as part of their OECE contract?  
**Answer:** No.
50. **Question:** To clarify a part of the RFQ, are OECE payments currently made based upon days of "enrollment" or days of "attendance"? The RFQ states "enrollment." We wanted to verify this. Please provide a brief description of how funding is determined, specifically if possible, using enrollment vs attendance information. As a part of this clarification, is the funding based upon "individual/specific children" or is it made based upon "child counts" served each day, or week or month or quarter or year (whichever the case) and their associated funding types and/or other data. If it is based upon specific children, can funding be differentiated based upon their schedules (i.e. a child may be funded differently by OECE in two different schedules).  
**Answer:** OECE payments currently made based upon days of enrollment. OECE payments are based upon individual/specific children not child counts, and funding amounts are differentiated based on children's schedules, ages, and setting (center vs family child care home).
51. **Question:** For payments made based upon age of the child, is the age a "rolling age" calculation, or is age determined based upon "age by September 1st" each year?  
**Answer:** Payments based upon age of the child are based on a rolling age calculation.
52. **Question:** Are companies from Outside USA able to apply for this? (e.g., from India or Canada)

**Answer:** Yes, but companies must be able to meet all the state and local requirements for city vendors which can be found here: <https://sfcitypartner.sfgov.org/> and must be able to participate in in-person meetings required by OECE. In addition, the City requires that storage of data occur solely within the continental United States and on computing and data storage devices residing therein.

53. **Question:** Do proposers need to be able to attend in-person meetings at OECE in San Francisco?

**Answer:** Yes.

54. **Question:** Can we perform the tasks (related to RFP) outside USA? (e.g., from India or Canada)

**Answer:** Yes; however, please make sure that your organization can meet the City's personnel-related ordinances which can be found here: [http://www.amlegal.com/codes/client/san-francisco\\_ca/](http://www.amlegal.com/codes/client/san-francisco_ca/)

55. **Question:** Can we submit the proposals via email?

**Answer:** As stated in the RFQ on pages 18 and 33, you should submit 1 electronic copy (via pdf ) to both [ella.lee@sfgov.org](mailto:ella.lee@sfgov.org) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org).

56. **Question:** Our organization's software cannot perform data synchronization of enrollment data from the OECE-funded central eligibility and waiting list. How will this impact your agency?

**Answer:** OECE is seeking proposers whose systems meet the required features. *Section 3.3 Data synchronization of enrollment data from OECE-funded central eligibility and waiting list* from the Scope of Work outlines a required feature.

57. **Question:** Our software does not support data synchronization of continuous quality improvement and QRIS data from WELS. How will this impact your agency?

**Answer:** OECE is seeking proposers whose systems meet the required features. *Section 3.4 Data synchronization of continuous quality improvement and QRIS data from WELS* from the Scope of Work outlines a required feature.

58. **Question:** We do not support data synchronization of other outside data. How will this impact your agency?

**Answer:** OECE is seeking proposers whose systems meet the required features. *Section 3.5 Data synchronization of other data* from the Scope of Work outlines a required feature.

59. **Question:** Our software does data extracts on a project basis. Monthly data extracts are not included in our subscription plans. How would this impact your program?  
**Answer:** OECE is seeking proposers whose systems meet the required features. *Section 4.2 Repository with monthly snapshot of production data* from the Scope of Work outlines a required feature.
60. **Question:** Our software can perform archives for your program, however, we only allow 20 total system archives to be completed. How will this impact your program?  
**Answer:** OECE is seeking proposers whose systems meet the required features. *Section 4.2 Repository with monthly snapshot of production data* from the Scope of Work outlines a required feature.
61. **Question:** We do not allow fiscal reporting within our software which handles PIR funding information, but no fiscal reporting. How would this impact your program?  
**Answer:** OECE is seeking proposers whose systems meet the required features. *Section 4.6 Reports related to state funding* and *Section 4.7* from the Scope of Work outline required features related to fiscal reporting.
62. **Question:** Our software supports the California Immunizations Registry Report. How will the availability of these reports impact your program?  
**Answer:** The report you mentioned is not a required feature. OECE encourages proposers to identify features beyond the required and desired features in their application.
63. **Question:** Training is not included in our subscription plans automatically; however, it is available for purchase while purchasing our product. Would an additional charge for training be acceptable for your agency?  
**Answer:** Yes.
64. **Question:** Our software is available in English, however, we do not have an option for traditional Chinese. Traditional Chinese can be inputted as a primary language choice for participants and their families. We also have options within our module designer feature and agency specific fields that are available in other languages. How would this impact your agency?  
**Answer:** OECE is seeking proposers whose systems meet the required features. OECE is interested in data systems that also include the *Desired Features for System* on page 15. Under *Desired Features for System*, *subsections ii and vii* from the Scope of Work address languages.

65. **Question:** Our software does not offer accessible modified access to its users. How would this impact your program?  
**Answer:** OECE is seeking proposers whose systems meet the required features. OECE is interested in data systems that also include the *Desired Features for System* on page15. Under *Desired Features for System, subsection iii* from the Scope of Work addresses accessibility.
66. **Question:** Our software does not calculate fiscal data like calculations and payments. How would this impact your program?  
**Answer:** OECE is seeking proposers whose systems meet the required features. Sections *4.4 End user formula-based fiscal reports and Section 4.7* from the Scope of Work outline required features.
67. **Question:** Our software does not have a login area for parents to view data related to enrollment, however, we do offer a customizable online application for your program that can be available online to parents. Our applications are not available in traditional Chinese. How would this impact your program?  
**Answer:** OECE is seeking proposers whose systems meet the required features. OECE is interested in data systems that also include the *Desired Features for System* on page15. Under *Desired Features for System, subsection vii* from the Scope of Work outlines a desired feature.
68. **Question:** Our software does not allow Microsoft Outlook and Google to link with our software. However, we do offer automatic emailing of our Dashboard, To-Do List, and Email & Texts to parents. How would this impact your program?  
**Answer:** OECE is seeking proposers whose systems meet the required features. OECE is interested in data systems that also include the *Desired Features for System* on page15. Under *Desired Features for System, subsection ix* from the Scope of Work outline desired features.
69. **Question:** Our organization’s software does not perform browser compatibility testing. How will this impact your program? Also, what is the desired timeframe for these options, and can we have clarification on what is meant by “error correction”?  
**Answer:** OECE is seeking proposers whose systems meet the required features. *Licensing and Maintenance, subsection a* from the Scope of Work outlines required features. Proposers can specify timeframes for the requirements outlined. Error correction generally refers to a bug fix, patch, or other modification that corrects an error.
70. **Question:** Our software cannot guarantee an exact response time of 0.439 seconds at peak hours, as this depends on many outside variables used by your program such as device and network speeds. Our software is available for use 24 hours a day, 7 days a

week with the exception of planned maintenance that is always shared with our users conveniently. How will this impact your program?

**Answer:** OECE is seeking proposers whose systems meet the required features. *Licensing and Maintenance, subsection b* from the Scope of Work outlines required features.

71. **Question:** Our system does not allow user access to the frequency of error messages, as that is confidential system information. We also do not foster a connection with Google Analytics. What are the other metrics/reports required from OECE? How would this impact your program?

**Answer:** OECE is seeking proposers whose systems meet the required features. *Licensing and Maintenance, subsection i* from the Scope of Work outlines required features.

72. **Question:** What are the custom report-writing requirements requested by your program?

**Answer:** The selected vendor will need to work with OECE to gather the business requirements for the reports building from user and stakeholder input.

73. **Question:** Early Learning SF System Integration is available with our system for an additional cost. Would that be acceptable for your program?

**Answer:** Yes, please include all costs in your budget.

74. **Question:** Our organization has an existing disaster recovery and business continuity plan. Are you requesting a custom plan?

**Answer:** Yes. The disaster recovery and business continuity plan requested is a plan for OECE to recover and continue its business operations specific to the data system, in the event that the data system becomes unavailable. This will incorporate response and recovery efforts from the Contractor as well as fallback/workaround procedures for OECE during an outage.

75. **Question:** Can you please explain the meaning of “User Level Go-Live” for your program?

**Answer:** User-Level Go-Live refers to the point in time when the system is available to be accessed by end users.

76. **Question:** Could you please provide a further explanation of User Acceptance Criteria?

**Answer:** Acceptance Criteria are conditions which a software application should satisfy to be accepted by a user or customer.

77. **Question:** Could you please provide clarification on the “user-level go-live launch”. What is specifically requested with this deliverable?

**Answer:** User-Level Go-Live refers to the point in time when the system is available to be accessed by end users. In addition to the general requirements related to maintenance, customer service, technical support outlined in the Scope of Work, OECE would like proposers to propose specific activities to support a successful user-level go-live launch (for example increased staff capacity from the vendor during the first two weeks after launch).

78. **Question:** We just want to verify that the "Audited Financial Statement" for the past two fiscal years can be "Pending" at the time of submittal in the event that it cannot be completed by the proposal submittal date.

**Answer:** Please submit the last two COMPLETE audited financial statements with your proposal.