Rural Community Assistance Corporation (RCAC)
Proposal Questions and Responses

RCAC seeks to retain a consultant or firm to undertake a review of existing data systems and processes to recommend the best solution to achieve its goal of accurate data that is easily available and integrated across the organization.

General Questions

1. Are questions due by a certain date or up until the proposals are submitted?
   Questions can be asked any time until 5pm PT on December 5th, with the caveat they may not be answered if they're submitted on the final day.

2. Are companies from outside the USA eligible to apply for this RFP?
   Companies from outside the USA are eligible to apply, but RCAC maintains a preference for firms who are based inside the USA and are familiar with federal and Western state policies, funding, and programs.

3. Can work related to the RFP be performed outside of the USA?
   Work can be performed outside of the USA, but ideally it is based in the US.

4. Are in-person meetings expected or required?
   In-person meetings are not expected nor required for this RFP. If in-person meetings are desired, they would occur in West Sacramento, CA.

5. Can proposals be submitted via email?
   Proposals **must** be submitted via email to dbostic@rcac.org.

6. Who will be managing the project for RCAC?
   Darcy Bostic, Data and Impact Manager, will be managing the project for RCAC.

7. Who are the primary decision makers for awarding the project? Will this be by a single person, or by a committee? Can you please relay the title and/or role of all decision makers?
   Our COO, Cyndi Spencer, and Data and Impact Manager, Darcy Bostic, will be making the final decision, but we will be considering input from our internal Data and Impact Working Group. This Working Group is about 15 people who hold various positions in the organization.

8. How many RFP responses are you planning to receive? Have you previously worked with any of the firms that are bidding on the project?
   We have no expectations for the number of RFP responses. We are not expecting to receive any RFPs from firms we've worked with in the past.

9. The RFP states the project duration as a total of 3 months—What is RCAC's ideal start date for the project? Is there anything specific driving the timeline?

Ideally, the start date would be either the week of 12/12 or 12/19, depending on how long it takes us to make an offer. There is nothing specific driving the timeline, but staff are very eager to transition to systems that better support their work.

We expect this “roadmap” phase to take no more than 3 months. We understand that implementation could take much longer, and are open to timelines suggested by the roadmap developed. Ideally, most departments will be piloting and/or iterating on some version of an integrated solution within a year of beginning implementation.

10. Can you please share how you arrived at the conclusion that this phase should last no longer than three months?
    Staff are eager to see processes change. We would like to be as thorough yet efficient as possible. This phase is geared towards helping RCAC make decisions about modernizing our technology stack. We strongly prefer to keep things moving during this process, since it can be easy to get stuck in the planning phase. The implementation phase, which can happen iteratively, is anticipated to take much longer. If absolutely necessary, we are open to extensions, especially if RCAC staff schedules prevent timely advancement of project goals, but would prefer to avoid extending the process if possible.

11. Does RCAC have a budget range that they are looking to stay within for this project?
    We have no set budget.

12. For software option costs – does RCAC need total cost of ownership including internal staffing and support for the solution, or only external product costs from potential vendors?
    RCAC would like to consider the complete cost of ownership, accounting for the subscription costs from potential vendors and any additional staff, training, implementation, and other currently unforseen costs.

13. The RFP states that proposals “should not exceed 5 pages.” Would a cover page or appendices count towards that maximum? For example, if a proposal is 8 pages long (1 cover page, 5-page proposal, 2 pages of “about us” information in an appendices), would that fall within the parameters?
    Cover pages and appendices will not count towards the proposal. However, we do ask that you address all the proposal requirements within the 5 pages. For example, a summary of your organization and project team should be somewhere within the 5 pages, though you are welcome to add more about your organization in appendices if you like.

14. Will any external parties be included in the interview/scoping process?
    We have one consultant (Barbara Richard) who will remain engaged in this process staff until March 2023.

Success Criteria

15. What are the main success criteria for the target solution?

Functionality
• Ability to search by name of location, organization or person, name of project, internal point of contact (like a TAP), department, or funding source.
• Real-time status of deliverables for different funding sources in a centralized location (every funding source has a different way of tracking this right now)
• Improved data quality (with data validated fields)
• Data (especially PII) remains secure.
• Ability to update the platform(s) as RCAC grows without necessarily needing a consultant.

Staff Experience
• Hours of staff time spent collating data decreases
• Staff feel increased transparency across the organization and increased independence to find data points themselves.

Organizational Goals
• Number of data collection methods decreases
• Number of common data points collected across the organization increases

16. Could you list the most critical functionality of the desired solution? (in addition to the data consolidation/analysis area if that's the case)
Understanding who at RCAC is talking to or working with whom, when, and the substance of that engagement and visualizing it many different ways (dashboards, geospatial/mapping of data, tables).

In other words, data across all departments is linked together and staff can see (or look up) communities who have worked with multiple departments or programs.

As an example: TAP A worked with Community B in 2021 on an Environmental Project. TAP A entered this data into a database only the Enviro department has access to. In 2022, Community B calls RCAC, requesting Housing Assistance. TAP A has left RCAC. The Housing Department treats Community B as a new client because they have no internal way to find out whether anyone has worked with Community B (other than asking around). With a functioning solution, Housing should be able to quickly search for Community B and see the breadth of RCAC engagement with them over time.

17. Do you anticipate this solution will integrate with your loan processing? If so, are you able to share what tools/technologies you utilize for application through award and tracking for loans?
This solution should consider our loan processing needs, yes. We are in need of new systems for our entire loan process (from application to award to tracking).

Data Processing

18. You mentioned that data is primarily stored in Word/PDF and Excel files. What is the primary purpose of this data? Are these documents unified for all departments?
    These documents are not unified for all departments. In many cases, they are program specific. Most of the data is used for tracking outputs (number of loans made, type and number of water systems or housing organizations who received technical assistance, attributes of training attendees).

    Much of the onboarding work will involve understanding RCAC's business process. Our processes are complex and span a wide range of topics that are difficult to describe without providing in-depth training.

19. You mentioned three data inventories. Please list the systems and technologies and the order in which they will be connected to the target solution (separate internal and external systems).
    The data inventories are simply excel files that identify the current location of many data points. There are very few technologies that will need to be connected to the target solution, and those will be described during the onboarding.

20. Please provide a list of Entities' data sources for further consolidation into the platform
    Most data is entered by TAPs. We also routinely pull data from external data sources including the US Census (ACS and Decennial), Opportunity Zones, Justice40 Disadvantaged Community Census Tracts, Persistent Poverty Counties, and more. It would be helpful to have these data sources populate (Ex. Is project within X geography? Y/N) in a centralized system.

21. What is the estimated data volume for each data Source? What is the anticipated yearly growth? Historical data will be helpful
    We do not have any large data sources – most data is stored in relatively small excel files. We can expand upon this question during the interview and onboarding processes.

22. Can you provide an estimate of the number of word, pdf, and/or excel documents that are utilized for storing data today? Feel free to share samples if you deem appropriate.
    We are not a big data organization. There are likely over 200 documents that are actively used across the organization on any given day (to collect, update, and store project information), in addition to the data entered in other databases.

23. Could you describe the requirements for data processing? Do you need a real-time or defined frequency?
    Most data can be refreshed daily or weekly, real-time is not especially necessary.

24. You mentioned having different data collection methods, source databases, and software. Could you describe ETL / ELT / ELTL processes in the current environment?
    We have limited ETL processes for a few programs within the organization, but these processes likely need to be revised.

25. Do you plan to implement a data security rules model to regulate access to data and reports? Please clarify the needed layers of security for the target solution (data access, functionality access, roles model, encryption requirements, etc.)
    Yes. AES Encryption during data transfers and hierarchical access based on roles within the organization will be necessary.

26. Do you have internal policies, technical restrictions, or compliance requirements for solution implementation? Please describe
    We can expand on this during the interview and onboarding processes.

27. Is there any sensitive data and specific regulation the system should comply with?
    Yes. We are a CDFI and do maintain PII in a secure location.

28. Do we need to consider compliance with standards, including HIPAA, GDPR, or anything else?
    There are no additional compliance standards to consider.

General Software

29. The RFP states: "…programs within RCAC departments have different data collection methods, source databases, and use different software." What are the primary databases/software that are being used in the various programs? How many systems are up for replacement?
    Most of our data is collected and stored in spreadsheets, documents, databases, and web-based lists. Some teams, like the Events department or our Loan Fund, use sector-specific software (like for hosting virtual events or loan origination/servicing) that could also use reassessment.

    Each program within a department (ex. Agua4All under Environmental or Housing Development under Housing) has developed a different 'system' for capturing and storing data. Overall, there are maybe 20 programs/systems of varying complexity whose methods need to be considered and integrated.

30. Do you plan to implement a CRM, or do you need to collect, store and process data about your clients in a unified form across all departments?
    We are open to a CRM or other solution based on the recommendations from this initial phase. Regardless, both collecting (1) common data points across departments and (2) program-specific data needs are essential.

31. What are the 3rd party/outside dependencies to consider before we can get started?
    Though we recognize not answering this question will inevitably require the proposals submitted be more general than ideal, we will not post the software we use publicly. Instead, we will share it during the interview and onboarding processes.

32. Task 3: You mentioned that has already collected information about the source repository/definitions and requirements. When can you share this information?
    This information will be shared during the onboarding process.

33. What workplace suite does RCAC use? G-Suite? Microsoft Office? Other?
    We primarily use Microsoft Office products.

34. Do you have preferences on the technological stack? (please specify)
    We are most familiar with Microsoft, but we are also open to any software that would best serve the needs of our staff and organization.

35. Are there any preferences within Cloud Based providers: Azure, AWS, Google, or others?
    We have a slight preference for Azure, but are open to other providers based on cost (both to staff time and price) and the best tool to support the entire stack.

36. What reporting tools are currently used for report generation?
    Excel is our primary tool for generating reports.

37. The data is used to communicate impact and make decisions about future directions for the organization. Please provide a list of required reports for further BI implementation (or their number and types). What are these reports, and what Entities are needed to create them?
    We do not have many pre-made reports we currently use to communicate impact. Most of our reports are manually created and primarily communicate program activity and outputs to funders.

    We have a variety of KPIs that we track in Excel (which will be provided during onboarding). We are also in the process of approving a Theory of Change that will allow us to create new questions and reports about our data.

    Other reports we create are standard financial reports (monthly inflows-outflows, AR-related data, quarterly lending reports, etc).

    Ideally, in the futures super-users should have the ability to create and save a shared report so that less familiar staff can benefit without needing to know how to create a report.

38. Can we assume that data sources contain all information needed for reporting, or do you expect additional data sources or manual data input?
    Data sources do not currently contain all information required for reporting because we do not have standard reports in many cases. In addition, we regularly receive additional requests for data that we do not collect, so we need a system to be flexible enough to allow for additional data fields, when needed.

39. RCAC have documentation on how KPI's and other reporting is currently put together? Or will this information need to be gathered from interviews?

KPIs are centralized and coordinated by the Data and Impact Manger. Other reporting processes (primarily to funders) will need to be gathered through interviews.

Departmental/User Involvement

40. What departments will be involved in the project? Can RCAC provide an organizational chart and/or a list of departments and roles that should be involved in stakeholder interviews?

    There are extensive needs across our departments. All departments are expected to participate in stakeholder interviews to ensure (at minimum) that necessary integrations with existing systems (if systems are not replaced) are considered.

    We will provide an organizational chart to the consultant we select, but for context, our departments are listed below.
    Our Programmatic Departments include: Loan Fund, Community and Environmental Services, and Housing.
    Our Internal Departments include: Finance, Grants and Contracts Administration, IT, Facilities, Events, Staff Operations (HR), and Communications and Fund Development.

    Most extensive input will come from the directors of the departments, but we also have a Data and Impact Working Group that can provide ongoing feedback and can provide access to other staff as needed.

41. How many stakeholders are involved in the project and decision-making? You described a list of possible stakeholders involved - please, specify the number of possible contact points.

    Various stakeholders will be involved:
    • Our Senior Leadership (including the CEO, COO, CFO) is comprised of about 9 people.
    • We have a Data and Impact Working Group that includes about 15 people.
    • Our IT department is 4 people.
    • The staff that would use the software is probably close to 100+. The D+I WG comprises some representatives of this group, but a staff-wide survey could also be considered to get a broader perspective too.

    Decision Makers are a smaller subset comprised of the COO, CFO, IT Manager, and Data and Impact Manager.

42. Do you have a dedicated technical specialist who can consult the selected consultant team about currently used systems, especially customized ones, company-specific restrictions and constraints, data ownership, and providing required access to the in-scope systems? Will this person/persons be available for at least two (and up to 20 hours) per week to communicate with the selected consultant team during project implementation?

Yes. The Data and Impact Manager will be the first point of contact for learning about currently used systems, and will be available for more than 2 hours per week. We have an IT team who can set up access and further describe the in-house software, but their time is more limited – one hour per week is more likely. We can discuss needs with the IT team during onboarding as well.

43. Can you share the makeup of RCAC's IT/technical support team?
    Our IT team is made up of a Manager, Database Administrator, Sharepoint Developer, and Desktop Support Technician.

44. You mentioned three types of users: TAPs, Grants and Contracts staff, Program managers, Grant writers, and senior staff. Please describe their responsibilities, the data they use, and the capabilities the system should supply them. Should they have different access/rights? Do they meet any specific security restrictions?
    We will provide more detailed information on roles during onboarding.

    In short,
    • TAPs enter data into program-specific data entry tools. "Playbooks" that help TAPs enter data in a workflow-y way would be helpful.
    • Grants and Contracts Staff collate the data TAPs enter for reporting to funders. These staff need an easier way to pull data related to a variety of programs instead of learning program-specific data collection methods.
    • Grant writers and senior staff are interested in high-level data across the organization (more related to our impact and work across our service area). This data is hardest to put together since few folks have time to pull data from a variety of programs and answer impact-related questions routinely.

45. Are the target users of the solution internal or external?
    The users are primarily internal.

46. Will Self-service BI be relevant? E.g., professional users can independently perform queries on the necessary data and generate reports. If yes, when do you want the option to be available?
    Yes, this would be ideal, but we do acknowledge that significant training may be required to make self-service BI a reality. We do have a custom database where queries are possible, so there is some level of familiarity with a few staff. We are willing to iterate on the development of self-service BI. Ideally, tools could be released with completion of onboarding of each department.

Data Models

47. Do you have a theory of change or logic model for your programs that you are able to share?
    We will be able to share a Theory of Change during the interview and onboarding processes. We recently developed a TOC but it is not approved for publication yet.

48. Do you have an inventory of indicators utilized in measurement of the theory of change?

Yes, we have an inventory of indicators we would like to use to measure our progress towards our vision and our impact, but right now we do not collect a lot of this information. We also do not have a complete inventory of all of the output data we collect across programs. We do have a subset of output data collected across departments that can assist with understanding our programs better.

49. Do you have a sharable systems/tools inventory or solution architecture document/diagram?
    We have an inventory of systems we use to collect data, but no overarching architecture document. This graphic below – also available here (https://dbdiagram.io/d/629f7a4e54ce26352779b56c) - is a draft portion of some common data points we would like to collect across the organization. There are many more tables that could be added, but hopefully this helps provide a feel for what RCAC is looking for. It does not represent any database architecture currently in place at RCAC.