

# RFP ATTACHMENT V: PROPOSAL TEMPLATE

*Instructions are provided in blue and may be deleted. Please complete your response in the template provided, and indicate clearly where separate documents are provided.*

## Executive Summary

### 1. ***Proposer Information***

Company Name

Company Address

Location of Office to  
Perform Services  
under this RFP

City Vendor ID

*Note: Possession of this number serves as partial verification that the Proposer has completed the City's administrative requirements (see Attachment III for more details).*

### 2. ***RFP Contact***

Clearly identify the person that will serve as the overall RFP contact.

Name

Title

Email

Phone

Fax

Address

### 3. ***How did you find out about this RFP Opportunity?***

*Insert Response Here.*

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### **4. Proposer Overview**

#### **Proposer Firm Ownership and History**

Briefly describe your firm, including history, organizational structure, ownership structure, and names of principals. Include any information that may be of value to the City in evaluating your proposal.

[\*Insert Response Here.\*](#)

**Number of years in business.** How long has your firm provided Web-Based Case Management Systems that enable Juvenile Probation Officers to assess and monitor youthful offenders?

[\*Insert Response Here.\*](#)

#### **Total Staff Size and Experience**

Statement of your firm's total staff size, as well as the staff size of the local or regional office that will work on the Web-Based Case Management System described in this RFP.

[\*Insert Response Here.\*](#)

#### **Pending Litigation**

Briefly describe any pending litigation or litigation related to consulting services provided by your firm within past three years of this RFP issue date. If none, state "None."

[\*Insert Response Here.\*](#)

#### **Clients Relationships Severed for Reasons Other than Convenience**

Provide a list of your clients where the contractual relationship was not completed and was severed for reasons other than convenience. A brief description of why the relationship was severed and the name of the client and the client's project manager are also required. If none, state "None."

[\*Insert Response Here.\*](#)

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## Qualifications

### 1. *Minimum Qualifications*

Proposers not meeting these minimum qualifications, as demonstrated through the Prior Projects information provided, will not be considered and their proposals will be deemed non-responsive and not be evaluated. Be sure to complete this section, as described.

The Proposer certifies that it:

- A) **RFP ATTACHMENTS:** Has completed the requirements and submitted the forms described in RFP Attachments I, III, IV, and V as part of Proposal, as applicable.

☐ Yes

- B) **QUALIFICATIONS:** Proposer must have a demonstrated understanding of requirements related to child welfare and juvenile justice programming by having completed two (2) projects of similar scope. The lead staff proposed to be assigned to this project must each previously had a substantially similar lead role in at least one (1) of the projects described in the Prior Projects section below.

☐ Yes

- C) **Technical Server Requirements**

- a. Windows Server
- b. SQL Server 2008 R2
- c. SQL Reporting Services
- d. Microsoft .Net Framework 3.5 or 4.0
- e. Web-Based Application running on Internet Information Services (IIS)
- f. Application should support 150-250 Users
- g. Internet Explorer 8.0 or greater

☐ Yes

### 3. *Client List*

Attach or insert a client list that illustrates the breadth and depth of your firm's experience with Web-Based Case Management Systems.

[Insert Response Here.](#)

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### 4. *Proposed Staff Roles and Qualifications*

Describe proposed staff's direct experience creating Web-Based Case Management Systems that enable Juvenile Probation Officers to assess and monitor youthful offenders as related to the Scope of Work described in this RFP.

[\*Insert Response Here.\*](#)

Use the following tables or alternative format to provide detailed information on firm principals and proposed key staff members and other sub-consultant staff proposed who will create Web-Based Case Management Systems for the City. Include years of experience for the proposed individuals who create Web-Based Case Management Systems (or related services for subconsultants). Proposers are encouraged to include resumes or curriculum vitae ("CV") in lieu of providing a narrative. Include as many tables as necessary.

<b>Name, Title</b>	<a href="#"><i>Insert Response Here.</i></a>
<b>Proposed Role</b>	<a href="#"><i>Insert Response Here.</i></a>
<b>Experience working with Juvenile Probation</b>	<p>Include years of experience for the proposed individuals in Web-Based Case Management Systems (or related services for subconsultants).</p> <p>Describe experience working with staff at Juvenile Probation on Web-Based Case Management Systems, include previous roles and responsibilities.</p>
<b>Qualifications to Perform Services</b>	<a href="#"><i>Insert other qualifications narrative here, or indicate if resume or CV is attached.</i></a>

<b>Name, Title</b>	<a href="#"><i>Insert Response Here.</i></a>
<b>Proposed Role</b>	<a href="#"><i>Insert Response Here.</i></a>
<b>Experience working with Juvenile Probation</b>	<p>Include years of experience for the proposed individuals in Web-Based Case Management Systems (or related services for subconsultants).</p> <p>Describe experience working with staff at Juvenile Probation on Web-Based Case Management Systems, include previous roles and responsibilities.</p>
<b>Qualifications to Perform Services</b>	<a href="#"><i>Insert other qualifications narrative here, or indicate if resume or CV is attached.</i></a>

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<b>Name, Title</b>	<i>Insert Response Here.</i>
<b>Proposed Role</b>	<i>Insert Response Here.</i>
<b>Experience working with Juvenile Probation</b>	<p>Include years of experience for the proposed individuals in Web-Based Case Management Systems (or related services for sub-consultants).</p> <p>Describe experience working with staff at Juvenile Probation on Web-Based Case Management Systems, include previous roles and responsibilities.</p>
<b>Qualifications to Perform Services</b>	<i>Insert other qualifications narrative here, or indicate if resume or CV is attached.</i>

<b>Name, Title</b>	<i>Insert Response Here.</i>
<b>Proposed Role</b>	<i>Insert Response Here.</i>
<b>Experience working with Juvenile Probation</b>	<p>Include years of experience for the proposed individuals in Web-Based Case Management Systems (or related services for sub-consultants).</p> <p>Describe experience working with staff at Juvenile Probation on Web-Based Case Management Systems, include previous roles and responsibilities.</p>
<b>Qualifications to Perform Services</b>	<i>Insert other qualifications narrative here, or indicate if resume or CV is attached.</i>

<b>Name, Title</b>	<i>Insert Response Here.</i>
<b>Proposed Role</b>	<i>Insert Response Here.</i>
<b>Experience working with Juvenile Probation</b>	<p>Include years of experience for the proposed individuals in Web-Based Case Management Systems (or related services for sub-consultants).</p> <p>Describe experience working with staff at Juvenile Probation on Web-Based Case Management Systems, include previous roles and responsibilities.</p>
<b>Qualifications to Perform Services</b>	<i>Insert other qualifications narrative here, or indicate if resume or CV is attached.</i>

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### **5. *Prior Projects***

Provide information on a minimum of two (2), maximum of five (5) successfully completed (100% completed) Web-Based Case Management Systems.

**Select at least two (2) projects that best demonstrate the Proposer's expertise to meet the Minimum Qualifications described in this RFP and that are the most applicable to the City's needs described in the RFP Scope of Work.** Projects may be no more than five (5) years old, and should, to the extent possible, demonstrate experience with entities comparable to San Francisco (over 500,000 population).

Contacts for each project are required, and may serve as references for the Proposer. The City will not inform Proposers when references will be contacted. The Proposer should ensure that client contact information listed in the response is up-to-date and should notify clients that the City may be contacting them. See Attachment I, Section 14.

Feel free to add more projects to the template (if your firm is submitting up to five projects).

Failure to provide the information requested will result in a lower evaluation score and possible disqualification from further consideration.

## RFP ATTACHMENT V: PROPOSAL TEMPLATE

### PROJECT 1

Project	<i>Project Name</i>
Client	<i>Client Name (City, County, etc.)</i>
Client Unit	<i>Client Agency, Department, or Unit Name</i>
Client Contact Name and Title	
Client Contact Phone	
Client Contact E-mail	
Timeline	<i>Month/Year to Month/Year; Length of project beginning to end</i>
Consultant Lead(s)	<i>Staff Lead Name(s) – same as lead proposed to City?</i>
Fee	<i>\$00,000.00</i>
Number of Hours	<i>XX hours</i>

**Project Background** Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? If different, what were the goals and desired outcomes of your services?

[\*Insert Response Here.\*](#)

**Project Scope** What were the project tasks your firm completed? Provide sufficient information to give the City insight into the size/complexity and scope of the project.

[\*Insert Response Here.\*](#)

**Project Approach** How did you approach the project? What methodologies were used, and how did those address the project goals? Describe any challenges you may have faced, including strategies you used to address them.

[\*Insert Response Here.\*](#)

**Project Staffing** Identify each key person on the project team with titles and roles and hourly rate, including all subcontractors. Include brief narrative descriptions of the responsibilities each person had on the project.

[\*Insert Response Here.\*](#)

**Involvement of Client and/or Stakeholders** Discuss how client and any stakeholders were involved in project, major opportunities for input, client staff contributions, etc.

[\*Insert Response Here.\*](#)

**Project Outcomes** What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services.

[\*Insert Response Here.\*](#)

## RFP ATTACHMENT V: PROPOSAL TEMPLATE

### PROJECT 2

Project	<u>Project Name</u>
Client	<u>Client Name (City, County, etc.)</u>
Client Unit	<u>Client Agency, Department, or Unit Name</u>
Client Contact Name and Title	
Client Contact Phone	
Client Contact E-mail	
Timeline	<u>Month/Year to Month/Year; Length of project beginning to end</u>
Consultant Lead(s)	<u>Staff Lead Name(s) – same as lead proposed to City?</u>
Fee	<u>\$00,000.00</u>
Number of Hours	<u>XX hours</u>

**Project Background** Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? If different, what were the goals and desired outcomes of your services?

[Insert Response Here.](#)

**Project Scope** What were the project tasks your firm completed? Provide sufficient information to give the City insight into the size/complexity and scope of the project.

[Insert Response Here.](#)

**Project Approach** How did you approach the project? What methodologies were used, and how did those address the project goals? Describe any challenges you may have faced, including strategies you used to address them.

[Insert Response Here.](#)

**Project Staffing** Identify each key person on the project team with titles and roles and hourly rate, including all subcontractors. Include brief narrative descriptions of the responsibilities each person had on the project.

[Insert Response Here.](#)

**Involvement of Client and/or Stakeholders** Discuss how client and any stakeholders were involved in project, major opportunities for input, client staff contributions, etc.

[Insert Response Here.](#)

**Project Outcomes** What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services.

[Insert Response Here.](#)



## RFP ATTACHMENT V: PROPOSAL TEMPLATE

### PROJECT 3

<b>Project</b>	<i>Project Name</i>
<b>Client</b>	<i>Client Name (City, County, etc.)</i>
<b>Client Unit</b>	<i>Client Agency, Department, or Unit Name</i>
<b>Client Contact Name and Title</b>	
<b>Client Contact Phone</b>	
<b>Client Contact E-mail</b>	
<b>Timeline</b>	<i>Month/Year to Month/Year; Length of project beginning to end</i>
<b>Consultant Lead(s)</b>	<i>Staff Lead Name(s) – same as lead proposed to City?</i>
<b>Fee</b>	<i>\$00,000.00</i>
<b>Number of Hours</b>	<i>XX hours</i>

**Project Background** Include background information regarding the client and/or program, as applicable. What were the project goals and desired outcomes? If different, what were the goals and desired outcomes of your services?

*[Insert Response Here.](#)*

**Project Scope** What were the project tasks your firm completed? Provide sufficient information to give the City insight into the size/complexity and scope of the project.

*[Insert Response Here.](#)*

**Project Approach** How did you approach the project? What methodologies were used, and how did those address the project goals? Describe any challenges you may have faced, including strategies you used to address them.

*[Insert Response Here.](#)*

**Project Staffing** Identify each key person on the project team with titles and roles and hourly rate, including all subcontractors. Include brief narrative descriptions of the responsibilities each person had on the project.

*[Insert Response Here.](#)*

**Involvement of Client and/or Stakeholders** Discuss how client and any stakeholders were involved in project, major opportunities for input, client staff contributions, etc.

*[Insert Response Here.](#)*

**Project Outcomes** What, if any, measurable service deliverables or outcomes can be attributed to your services? How did you add value to the client? Examples include but are not limited to the amount of cost savings as a result of services provided, legislative or policy changes, organizational changes, or other measurable indicators of successful implementation of findings from your services.

*[Insert Response Here.](#)*

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### Approach and Methodology, including Fee Proposal

**1. Describe your firm's proposed approach to services and activities described in Section 2, Scope of Work of the RFP.**

*[Insert Response Here.](#)*

**2. What makes your firm's approach to providing Web-Based Case Management Systems that are different or more effective than other firms providing the same services? Include differences in methodology, staff roles and responsibilities, and documentation processes, as applicable.**

*[Insert Response Here.](#)*

**3. Describe your firm's approach to Web-Based Case Management Systems, including data used and how department staff is involved in the process.**

*[Insert Response Here.](#)*

**4. What can your firm do to ensure a successful engagement with the City? What project performance outcomes do you expect to provide to the City?**

*[Insert Response Here.](#)*

**5. Describe any other asset, expertise, experience, data or technology that provides your firm with a competitive edge or advantage.**

*[Insert Response Here.](#)*

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### Fee Proposal

A spreadsheet or table format is preferred with sufficient detail for the City to determine the justification for what is being included.

The Proposer's total price quote shall serve as a fixed, not-to-exceed estimate. Each Proposer shall provide supporting details to show how it arrived at the total price quote. The City shall assess costs and work with the selected Proposer to develop a blended hourly rate to include and compensate Proposer for all services, travel, lodging, meals, miscellaneous and any other expenses related to the completion of services. Additional and separate cost reimbursement will not be provided by the City. Estimates should be based on Proposer's previous experience with projects similar in size and scope to that of this RFP.

Note that hourly rates provided shall apply to any and all as-needed services requested by the City for the full contract period under this RFP. Please see RFP Attachment I, Section 13.

Provide a total price quote with a breakdown of the number of hours and cost per deliverable and/or for the project tasks described in Section 2, Scope of Services of this RFP, as well as standard hourly billing rates by staff name/role, estimated percentage of overall team effort each staff person would allocate to the project, estimated total amount for travel and miscellaneous project expenses, the total number of hours, and the Proposer's total price quote.

[\*Insert Response Here.\*](#)

### Sample Products

If a proposer is selected to participate in the interview process they are required to conduct a demonstration of a sample product they have completed in the last five (5) years.

The sample product is not to be used by the Proposer as a substitute for providing all requested information in this Attachment.

Note that all documents under this RFP process are subject to public disclosure. Please redact confidential or proprietary information as appropriate.

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