

Allegheny County

Department of Human Services

REQUEST FOR PROPOSALS

**SCHEDULING AND/OR DISPATCH TOOLS TO COORDINATE
TRANSPORTATION SERVICES FOR CHILDREN AND YOUTH IN THE
CARE OF CHILD WELFARE**

RFP ISSUED	March 4, 2015
QUESTIONS AND REQUESTS FOR CLARIFICATION ACCEPTED VIA EMAIL	Until 5 Business Days Before Proposal Due Date
RESPONSES (Q & A) POSTED ON WEBPAGE	Ongoing- Final Q&A Posted 1 Business Day Before Proposal Due Date
PROPOSALS DUE	April 6, 2015
ESTIMATED AWARD DECISION / NOTIFICATION	May, 2015
ESTIMATED START DATE	July, 2015

GLOSSARY

Agreement: The contract negotiated between the County and the Successful Proposer to provide the Contract Services.

Case Aide: DHS CYF staff who provide general assistance to case managers by 1) transporting children and youth in the care of CYF 2) supervising court mandated visits between children and youth in the care of CYF and their families and 3) performing clerical support as needed.

Contract Services: The specific services which the Successful Proposer agrees to provide to the County in response to this RFP as more particularly described in the Scope of Services in the Agreement.

CYF: The Allegheny County Department of Human Services' Office of Children, Youth and Families (CYF) is responsible for protecting children from abuse and neglect, preserving families (whenever possible) and providing permanent, safe homes for children either by assuring safety within the child's own family, or by finding an adoptive home or another permanent setting for those children who cannot be reunified with their family. CYF provides a wide range of preventive, protective, supportive and direct services through caseworkers, case aides and other support staff, as well as a network of contracted agencies.

DHS: Allegheny County's Department of Human Services (DHS) is responsible for providing and administering publicly-funded human services to Allegheny County residents. DHS is dedicated to meeting these human service needs, most particularly for the county's vulnerable populations, through an extensive range of information exchange, prevention, early intervention, case management, crisis intervention and after-care services.

KIDS: Key Information and Demographics System (KIDS) is a fully integrated child welfare management application that supports the records management process from the initial reporting of allegations of child abuse or neglect through the delivery and payment of services.

Proposal: The response submitted by a Proposer to this Request for Proposals.

Proposer(s): the entity or entities submitting a Proposal to the County in response to the RFP in an effort to become the Successful Proposer.

RFP: Request for Proposals

Successful Proposer: The Proposer selected by the County to provide the Contract Services.

GENERAL INSTRUCTIONS AND INFORMATION

Purpose

Allegheny County is soliciting Proposals for Scheduling and/or Dispatch Tools to centralize and efficiently manage, schedule and assign responsibility for the transport of children and youth in the care of child welfare within DHS. DHS intends to enter into an Agreement with the Successful Proposer(s) to provide the Contract Services for a term of three years with a County option to extend

the term of the Agreement. Funding will not exceed \$35,000 for both the Scheduling and Dispatch Tools in year one and will not exceed \$25,000 per year in years two and three. If the Proposer anticipates that the cost to provide the Contract Services will exceed these amounts, they should provide a justification for higher costs in the Proposal.

General Information about a Request for Proposal

Allegheny County issues Requests for Proposals (RFPs) to identify entities with the ability to meet the identified needs and quality standards within specified program and funding guidelines. Evaluation criteria is included in an RFP (see Scope of Services Requested on Page -- 5) to measure how well a Proposal meets these criteria. The County may request additional information and/or a presentation from the Proposer during the Proposal evaluation period. Following the evaluation period, an Agreement to provide the Contract Services may be awarded to the most qualified Proposer(s), that is, the Successful Proposer(s).

The issuance of this RFP does not obligate the County to enter into an Agreement with any Proposers.

Communication about this RFP

DHS is the “Issuing Office” for this RFP and is the sole point of contact for all questions and communication regarding this RFP. All communication about the RFP, including requests for additional information or clarification, should be submitted via email to:

DHSProposals@alleghenycounty.us.

All questions and/or requests for clarification concerning this RFP must be submitted no later than five business days prior to the proposal due date in order to guarantee a response on the website.

All information about the RFP, including changes, clarifications and responses to Proposer questions, will be posted on the RFP website at: <http://www.alleghenycounty.us/dhs/solicitations.aspx>

Eligibility

Entities eligible to submit a Proposal in response to this RFP include non-profit organizations and for-profit organizations or businesses. In order to be considered under this RFP, Proposers must be willing and able to meet all of Allegheny County’s contractual requirements (available at: <http://www.alleghenycounty.us/dhs/contracting.aspx>).

Minority, Women or Disadvantaged Business Enterprise (M/W/DBE) Requirements

This RFP contains requirements for Proposers to assist Allegheny County in meeting its M/W/DBE goal (all contracts and other business activities entered into by Allegheny County having overall goals of 13% for MBEs and 2% for WBEs). A listing of M/W/DBEs certified by Allegheny County and the Pennsylvania Unified Certification Program can be found at www.county.allegheny.pa.us/mwdb

For more information about M/W/DBEs, please review the following. An M/W/DBE Participation Statement or Waiver Statement is **REQUIRED** with Proposal submission.

[MWDBE Contract Specifications Manual](#)

[MWDBE Participation Statement form](#)
[MWDBE Waiver Statement form](#)

Proposal Preparation Costs

The Proposer is responsible for all costs related to the preparation and submission of a Proposal. Allegheny County is not obligated, in any way, to pay any costs incurred.

BACKGROUND

About DHS

DHS was created in 1997 to consolidate the provision of human services across Allegheny County. It is the largest department within Allegheny County government. In addition to its Executive Office, DHS encompasses five program offices (Behavioral Health; Children, Youth and Families; Community Services; Intellectual Disability; and the Area Agency on Aging) and three support offices (Administrative and Information Management Services; Community Relations; and Data Analysis, Research and Evaluation). Last year, DHS served more than 210,000 individuals (approximately one in six County residents) through an array of 1,700 distinct services.

DHS is responsible for providing and administering publicly-funded human services to Allegheny County residents and is dedicated to meeting these human service needs, particularly for the County's most vulnerable populations, through information exchange, prevention, early intervention, case management, crisis intervention and after-care services.

DHS provides a wide range of services, including: services for older adults; mental health and drug and alcohol services (includes 24-hour crisis counseling); child protective services; at-risk child development and education; hunger services; emergency shelters and housing for the homeless; non-emergency medical transportation; job training and placement for public assistance recipients and older adults; and services for individuals with intellectual and/or developmental disabilities.

DHS provides services to eligible individuals without regard to race, color, sex, gender identity or expression, sexual orientation, age, religion, national origin, political affiliation, disability, familial status, military service, or religious, community or social affiliations.

About CYF

The mission of CYF is to protect children from abuse and neglect; to preserve families, whenever possible; and to provide permanent, safe homes for children either by assuring safety within the child's own family, or by finding an adoptive home or another permanent setting for those children who cannot be reunified with their family. To achieve its mission, CYF provides a wide range of preventive, protective, supportive and direct services through caseworkers, case aides and other support staff, as well as a network of contracted agencies. Front-line workers and direct services are based out of five regional CYF offices that cover all geographic areas of the County.

About CYF Transportation Needs

DHS is responsible for transporting children and youth in care of CYF to approximately 700 appointments per month, including visits with parents and siblings, court hearings, and to school or daycare. The majority of these trips are recurring, such as daily transportation to and from school. This transportation is provided by case aides, who provide general assistance to case managers by transporting children and youth by supervising court-mandated visits with parents, and by performing clerical support tasks as needed. At any given time, DHS employs approximately 37 case aides who work varied schedules. Two-thirds of the case aides work from 8:30 a.m. – 4:30 p.m., Monday through Friday, and the rest cover weekends and evening/overnight hours. Occasionally, case aides may be required to flex, or adjust, their normal working hours to make scheduled trips, which can result in increased pay.

The current process for scheduling trips and assigning/dispatching case aides is decentralized and paper-based. Each case aide is assigned to one of five CYF regional offices. At each regional office, case aide supervisors receive trip requests from a caseworker and, in turn, schedule trips for the case aides assigned to that office. If a case aide supervisor at a regional office receives a trip request that cannot be accommodated (because no case aide is available), the case aide supervisor must reach out to the supervisors at other regional offices, via email, to fill the request. This results in lag-time in scheduling appointments and other inefficiencies in practice. Further, because the current scheduling system is arranged and recorded on paper, case aides cannot access their calendars in the field and must return to their regional office to view their schedule. DHS is seeking software solutions to improve current practice and create an efficient system for trip scheduling and case aide dispatch.

SCOPE OF SERVICES REQUESTED

Allegheny County is soliciting proposals for Scheduling and Dispatch Tools to centralize and efficiently manage, schedule and assign responsibility for the transport of children and youth in the care of CYF. A Scheduling Tool is a software program that gives users the capacity to organize, customize and consolidate the calendar schedules of several entities. A Dispatch Tool is a software program that allows dispatchers to recognize and track where entities, like drivers, are on the road, route drivers' paths and check travel time.

Proposers may submit Proposals for either a Scheduling Tool, a Dispatch Tool or for both a Scheduling Tool and a Dispatch Tool. If a Proposer wishes to provide both tools, the Proposer should submit one proposal with separate Development Approach, Functionality, Budget and Demonstration sections for the Scheduling Tool and the Dispatch Tool.

DHS envisions that the Successful Proposer's Scheduling and/or Dispatch Tools will be *stable web or cloud-based* long-term applications that can be updated or changed, as required. Proposed tool(s) may be customized or existing commercially available products that can be tailored to meet DHS's needs. Dedicated customer support from the Proposer should be available around the clock. The tool(s) will be managed by a small group of PC users (case aide schedulers). Read-only access must be available to all staff in the field (case aides and caseworkers) and in all regional offices (administrators), approximately 200 staff total. All case aides should be able to view their calendars/schedules via a smartphone application compatible with Android and iOS.

DHS will create a centralized unit of workers who will be responsible for using the Scheduling and Dispatch tools to coordinate and assign trip requests (location and composition to be determined). All case aides will be provided with a smartphone (make/model to be determined), so that they may have the ability to access their most current schedule in the field.

Through these tools, DHS seeks to:

- Centralize trip scheduling
- Create an efficient and clear scheduling process
- Improve the timeliness of trip assignment to case aides
- Enable case aides to access their schedules remotely

The Successful Proposer should describe the Scheduling and/or Dispatch Tool and plan to fulfill the requirements described below:

Scheduling Tool Functionality

Trip Assignment and Scheduling Capability

- Provide a clear scheduling interface that allows schedulers to quickly view all case aides on duty at a given date and time.
- Give schedulers the option to view the schedules of one or many case aides on past, present or future dates by day, week or month.
- Set and change case aide hours of availability and flex schedules (e.g., A case aide normally works 8:30 a.m. – 4:30 p.m., Monday through Friday, but has a trip next Wednesday at 7:00 a.m., so the schedule changes to 6:00 a.m. – 2:00 p.m.).
- Override availability with pre-scheduled time off and holidays.
- Show overtime trips taken outside normal working hours.
- Assign multiple case aides to a single trip.
- View all case aides available for an unassigned trip.
- Filter case aides by various categories (e.g., regional office, gender, vehicle capacity, custom skills/restrictions).
- Sort case aides by seniority.
- Color-code trip status by unassigned, assigned and canceled trips.
- Schedule recurring trips and apply edits to one or all trips in a sequence.
- Assign access levels by user.
- Be accessible on smartphones and other devices and offer instant notifications of new trip assignments, changes/cancellations and overtime opportunities.
- Provide the ability for staff to respond to overtime requests and dial contacts associated with a trip with one touch on their phone.

Additional features for consideration: 1) a messaging feature that would allow schedulers to text one or many case aides and 2) the ability to attach a child's photograph to the trip request.

Tracking and Reporting

- Provide a time-stamp system to track when requests were submitted, assigned and

cancelled/reassigned (with a field for notes) and when case aides were notified of and responded to overtime opportunities.

- Generate various reports on overtime/flexing, mileage trip counts (for a selected time period, if dispatch software is included) and client history (all trips for a specific case during a specific time period, including the names of case aides assigned to the trips).

Customization

- Provide a software algorithm, tailored to DHS-specific requirements (e.g., it should take into account availability of case aide resources, location of the pickup, and other criteria) that routes requests for trips to the correct case aide.

Dispatch Tool Functionality

The Dispatch Tool should provide GPS navigation and suggested routing, GPS tracking, mileage tracking and travel time estimates. Please include information about the platforms with which the tool is compatible (i.e., ability to sync to Scheduling Tools).

Features Required for both Scheduling and Dispatch Tools

Interface Capability

DHS is interested in creating an electronic interface between the proposed tool(s) and Key Information Demographics System (KIDS), which is DHS's CYF information system, a custom built .Net application. The desired functionality would enable KIDS to electronically send various data about the scheduling request to the tools (e.g., appointment date/time, appointment details) and for the tools to accept these data and automatically upload them into the request so as to eliminate manual data entry within the tool.

Excluded Features

DHS is not interested in a number of features that are common to commercially-available Scheduling and Dispatch Tools, such as timesheet, mileage reimbursement and payroll/HR functions. In addition, DHS has no need for any invoicing or billing features.

Budget

Proposers must provide a 3-year budget (use Appendix B, posted on DHS's Active Solicitation webpage) for the Scheduling and/or Dispatch Tools, including the costs of training and implementation, customization and maintenance. Include in the completed budget form the cost of creating a custom algorithm for DHS and any other customizations required to perform the functionalities detailed above. Proposers must describe their proposed billing practice (e.g., frequency), the staff budget (including benefits) to be included in the cost of the Proposal, and any features to be included in the tool(s).

If submitting a Proposal that exceeds \$35,000 in year one and \$25,000 per year in years 2 and 3, the Proposer must provide a justification for higher costs.

PROPOSAL INSTRUCTIONS AND FORMAT

A complete Proposal must include all of the components listed below, submitted as a Word document or PDF (budget may be submitted in Excel). Use 1-inch margins, 12 point font and numbered pages. Single spacing is permissible. Please adhere to page limitations indicated below; other than required attachments, no additional attachments will be accepted (attachments may be included as a link).

Organizational Experience

Proposers should complete this section ONCE, even if submitting a Proposal to provide both the Scheduling and Dispatch Tools.

- Provide a brief description of your organization's history.
- Describe your experience with software product installations and history with the proposed tool(s) (initial, past and future upgrades).
- Describe your experience in customizing the tool(s) to meet the needs of an organization.
- Describe the staff that will be working on implementing the tool(s). Who is the project manager who will be overseeing implementation? What is his or her experience with the tool(s)? With what other implementations have they been involved?

Scheduling Tool

Proposals should complete this section if proposing to provide the Scheduling Tool.

Development Approach

- Describe your approach to developing and implementing the tool, including a timeline. Will you perform the work remotely, on-site or a combination of both (if both, estimate the percentage of time for each).
- Will the proposed tool's design require that existing code be changed or will it use existing code as a baseline?
- What resources and support will you require from DHS, particularly in training and support once the tool has been implemented?
- What is the report capacity of the tool? What types of reports are included in the base tool and how can other reports be generated?
- Describe how many centralized users can utilize the tool at one time.
- Describe how case aides can engage with the tool through their smart phones.
- Describe how the tool will be user-friendly.
- Describe the type of initial and ongoing training and implementation support that will be offered.
- Describe how the tool will be maintained.
- Describe the implications of not purchasing/using the functions described in the excluded features section, above.

Functionality

- Please detail how the tool fulfills the functionality outlined in the Scope of Services section by completing Appendix A posted on the DHS Solicitation webpage.

Dispatch Tool

Proposals should complete this section if proposing to provide a Dispatch Tool either as a feature of the Scheduling Tool or as an independent tool.

Development Approach

- Describe your approach to developing and implementing the tool, including a timeline. Will you perform the work remotely, on-site or a combination of both (if both, estimate the percentage of time for each).
- What is the report capacity of the tool? What types of reports are included in the base tool and how can other reports be generated?
- Describe how case aides can engage with the tool through their smart phones.
- Describe the type of initial and ongoing training and implementation support that will be offered.
- Describe how the tool will be maintained.
- If proposing to provide the dispatch tool alone, describe how the tool is capable of interfacing with outside Scheduling Tools.

Functionality

- Describe what functionalities the tool has in terms of GPS navigation and suggested routing, GPS tracking, mileage tracking and travel time estimates. If proposing dispatch alone, please describe which platforms, relative to Scheduling Tools, that the tool is compatible with.
- Describe what functionality the Dispatch Tool has that would enable electronic data exchange, including what data formats the tool accepts for an electronic data exchange and whether there would need to be customization within the tool to implement such functionality. If customization is required, provide additional details about the type and extent of such customization.
 - If possible, DHS may consider integrating this functionality into other applications, to support other services. Describe how the functionality described above could be transferred to other tools.

Budget and Budget Narrative

Please provide a detailed 3-year budget and narrative (using Appendix B, posted on DHS's Active Solicitation webpage) that fits within DHS's funding guidelines. If the Proposer anticipates that the annual operating budget will differ significantly from the budget for the start-up year, please provide a justification for the difference.

- If the Proposal is to provide the **Scheduling AND Dispatch Tools**, please provide a separate budget for each tool.
- If any of the functionalities detailed in the Scope of Services section require customization by the Proposer, include those costs, by line item, in the budget.
- Include the Proposing organization's financials and describe how they reflect their financial policies and organizational stability. If the Proposing organization is for-profit and this information is not publically available, please indicate this in the budget narrative.

Demonstration Material

- Please include with the proposal a sample or demonstration material (screenshots or an actual tool) that will give the evaluation committee an idea of how the tool will look and function (if screenshots are provided, they will not count against page limits). If the Proposer is submitting a proposal to provide **Scheduling AND Dispatch Tools**, please provide a demonstration for the Scheduling Tool **AND** a demonstration highlighting the Dispatch Tool.

Required for Submission

- Executive Summary (1 page limit)
- Organizational Experience (3 page limit)
- Scheduling Tool
 - Development Approach (3 page limit)
 - Functionality- Appendix A (4 page limit)
 - Budget and Budget Narrative (Appendix B)
 - Demonstration Material
- Dispatch Tool
 - Development Approach (3 page limit)
 - Functionality (3 page limit)
 - Budget and Budget Narrative (Appendix B)
 - Demonstration Material
- References (1 page): Include name, affiliation and contact information (email address and telephone number) for three references who are able to address relevant experience with the recommended tool(s) based on a number of installations.
- Required Attachments
 - Cover Page
 - MWDBE Participation Statement form
 - W9
 - Vendor Creation Form

SCORING AND SELECTION PROCESS

Scoring Criteria

The narrative and budget sections will be evaluated as detailed below. Please note that the Scheduling Tool and Dispatch Tool will be scored separately, even if the Proposer is proposing to provide both. The Scheduling Tool will be evaluated on a total scale of 100 points and the Dispatch Tool will be evaluated on a total scale of 50 points.

Organizational Experience (15 points)

Scheduling Tool (85 points)

- Development Approach (15 points)
- Functionality (30 points)
- Scheduling Tool Budget (20 points)
- Scheduling Tool Demonstration Materials (20 points)

Dispatch Tool (35 points)

- Development Approach (5 points)
- Functionality (10 points)
- Dispatch Tool Budget (10 points)
- Dispatch Tool Demonstration Materials (10 points)

Selection Process

DHS will use a formal evaluation process to select the Successful Proposer, including review of the Proposal and additional information/presentation as requested. DHS may contact individuals or entities with whom the Proposer has had dealings in the past, regardless of whether or not they are included as references in the Proposal.

DHS will perform an initial screening of all Proposals received. For a Proposal to be eligible for evaluation, the Proposal must be:

- **Received from the Proposer by the due date/time**
- **Properly signed by the Proposer**
- **Properly formatted and include required forms and sections**

Proposals that do not meet the initial screening are subject to rejection without further evaluation.

After the initial screening has occurred, the evaluation process for Proposals is as follows:

- DHS will designate an evaluation committee to review and evaluate all Proposals submitted in response to this RFP. The evaluation committee may consist of some or all of the following individuals:
 - County employees/contractors
 - Representatives of foundations, educational institutions, community and civic organizations, businesses and/or non-profit agencies
 - Individuals selected for subject matter/content expertise or experience, or by virtue of other relevant experience/knowledge
- The evaluation committee will evaluate the Proposals based upon the Scoring Criteria.
- The County retains the exclusive discretion to shortlist a small number of Proposals receiving the highest or most satisfactory evaluations for more extensive review.
- If determined necessary, DHS may contact the Proposer for the purpose of clarifying any ambiguities in the Proposal, requesting Proposal modifications, or discussing Budget modifications.

Oral Presentations and Site Visits

DHS may create a short-list of Proposers who will be invited to give an oral presentation and demonstration of their tool(s). In that case, selected Proposers will be notified of the time and location, and will be provided with an agenda or topics for discussion. Questions asked during oral presentations or site visits will be for the purpose of clarifying the scope and content of the written Proposal. Upon invitation, DHS may ask the Proposer to demonstrate how the tool(s) would function in several scenarios. The Proposer would be

expected to demonstrate those functionalities during oral presentations.

Final Award Process

Following the evaluation process, which may include oral presentations and/or negotiations, the evaluation team will tabulate and submit an award recommendation to the DHS Director (the County reserves the right to recommend that none of the Proposals be selected). The DHS Director will then issue a recommendation to the County Manager who will make the final determination concerning award of an Agreement.

NOTHING HEREIN SHALL BE CONSTRUED OR INTERPRETED IN ANY WAY AS OBLIGATING THE COUNTY TO ENTER INTO AN AGREEMENT WITH ANY PROPOSER. THE COUNTY RESERVES THE RIGHT AT ALL TIMES NOT TO AWARD OR ENTER INTO AN AGREEMENT FOR THE SCOPE OF SERVICES FOR ANY REASON WHATSOEVER.

SUBMISSION INFORMATION

Proposals must be submitted by email to DHSProposals@allegchenycounty.us, no later than 3:00 p.m. EST on **April 6, 2015**. Proposals received after this time will not be accepted. The County reserves the right to extend or postpone the date and time for RFP activities; in the event of a change, the information will be posted on the website at <http://www.allegchenycounty.us/dhs/solicitations.aspx>.

If necessary, attachments may be sent via U.S. Mail, Courier or hand-delivery, by the date/time above, to:

Maria Wallace
Allegheny County Department of Human Services
One Smithfield Street – Suite 400
Pittsburgh, PA 15222-2221

You will receive an email confirmation of receipt of your Proposal. Please contact us (via email or by calling Maria Wallace at 412-350-7144) if you do not receive an email confirmation.

To be considered, the Proposal must include all of the specified information. DHS may request additional information and/or conduct investigation as necessary to determine the Proposer's ability to provide the requested service. This additional information may become part of the County's final award decision-making process.

All Proposals are the property of the County and may become part of any subsequent Agreement.

CONTRACT TERMS AND CONDITIONS

Agreement Terms and Conditions

The Successful Proposer will enter into an Agreement with the County of Allegheny, on behalf of DHS, for performance of the Scope of Services specified in this RFP and set forth in the Proposal. The Scope of Services specified in the RFP shall become the Contracted Services. Information about contracting with the County on behalf of DHS and the standard County terms and conditions for County contracts for services for DHS which will be included in the Agreement can be found on the DHS website at:

<http://www.alleghenycounty.us/dhs/contracting.aspx>
[HIPAA compliance](#)

DHS is a “covered entity” under the Health Information Portability and Accountability Act (HIPAA). The Successful Proposer must describe how it will comply with HIPAA requirements.

CYBER Security

A significant portion of DHS business activities and related billing carried out under this RFP are done through information management systems or tools, including email. Proposers should meet the minimum computer specifications beginning on page 14 of the [DHS Contract Specifications Manual](#) and should make sure their computers, laptops and other electronic devices have sufficient security software and settings to minimize the risk of a breach of information. In addition, the Proposer should have policies and procedures in place to assure that their electronic devices are physically secure when not in use (e.g., locked in a vehicle trunk, password protected, etc.).

Conflict of Interest

By submitting a Proposal, the Proposer certifies and represents to the County that the Proposer has not offered, conferred or agreed to confer any pecuniary benefit or other thing of value for the receipt of special treatment, advantaged information, recipient’s decision, opinion, recommendation, vote or any other exercise of discretion concerning this RFP.

Equal Employment Opportunity/Non-Discrimination

Proposer agrees to not discriminate against any employee, applicant for employment, independent contractor, consumer or any other person on the basis of race, color, religion, national origin or ancestry, sex, gender identity or expression,; sexual orientation, disability, marital status, familial status, age (40 or over), or use of a guide or support animal because of blindness, deafness or physical disability of any individual or independent contractor or because of the disability of an individual with whom the person is known to have an association or on any other basis prohibited by federal, state or local law.

APPENDIX A:
Scheduling Tool Functionality Matrix

For each item listed below, please describe:

- If the tool can perform the functionality as is (without customization), **OR**
- If the tool can perform the functionality with customization. If customization is required, please describe who will perform the customization (user or developer) and if the cost of customization is listed in your budget. If additional costs are not included in the budget, provide additional cost detail in the appropriate section, below.

Does the proposed tool:

Trip Assignment and Scheduling

- Provide a clear scheduling interface that allows the user to quickly view all case aides on duty at a given date and time?
Click here to enter text.
- Give users the option to view the schedules of one or many case aides on past, present or future dates by day, week or month?
Click here to enter text.
- Set case aides hours of availability and flex schedules?
Click here to enter text.
- Override available with pre-scheduled time off and holidays?
Click here to enter text.
- Show overtime trips taken outside of normal work hours?
Click here to enter text.
- Assign multiple case aides to a single trip?
Click here to enter text.
- View all case aides available for an unassigned trip?
Click here to enter text.
- Filter case aides by category (e.g. regional office, gender, vehicle capacity, custom skill/restriction)?
Click here to enter text.
- Sort case aides by seniority?
Click here to enter text.
- Color-code trip status by unassigned, assigned and cancelled trips?
Click here to enter text.
- Schedule recurring trips and apply edits to one or all trips in a sequence?
Click here to enter text.

- Assign access levels by user?

Click here to enter text.

- Offer accessibility on smartphones and other devices with instant notifications of new trip assignments, changes/cancellations and overtime opportunities?

Click here to enter text.

- Allow users to respond to overtime requests and dial contacts associated with a trip with one touch?

Click here to enter text.

- Provide a messaging feature that allows schedulers to text one or many case aides

Click here to enter text.

- Attach a child's photograph to a trip request?

Click here to enter text.

Tracking and Reporting

- Provide a time-stamp system to track when requests were submitted, assigned and cancelled/reassigned (with a field for notes) and when case aides were notified of and responded to overtime opportunities?

Click here to enter text.

- Generate various reports-overtime/flexing and client history (all trips for a specific case during a specific time period, including the names of case aides assigned to trips)?

Click here to enter text.

Algorithm Customization

- Have an algorithm tailored to DHS that routes the request to the appropriate case aide based on DHS specific requirements? For example, the algorithm should take into account availability of case aide resources, location of the pick-up, and other criteria to route the request to the correct case aide resource.

Click here to enter text.

Interface

- Perform an electronic data exchange with KIDS? Describe what data formats the software product accepts for an electronic data exchange.

Click here to enter text.

- Because DHS may consider integrating this functionality with other applications, please describe how the functionality described above could be transferred to other products.

Click here to enter text.

- If your tool does not have dispatch functionality, which platforms is your tool is compatible with (i.e. with what external dispatch systems can your tool sync)?

Click here to enter text.

APPENDIX B
Scheduling Tool Budget

		Year 1	Year 2	Year 3
Initial Costs*				
	Product			
	Customization			
	Hardware			
	Installation			
	Report Development			
	Sub-total:	0	0	0
Ongoing Costs				
	Annual product support			
	Support for existing customizations			
	Sub-total:	0	0	0
Application Software				
	Application (label and repeat by application)			
	Cost of license			
	Support and Maintenance			
	Sub-total:	0	0	0
One Time Implementation Services				
	Service (label and repeat by service)			
	Hours			
	Hourly Rate			
	Sub-total:	0	0	0
Customizations				
	Customization (label and repeat by customization)			
	Sub-total:	0	0	0
	TOTAL:	0	0	0

* Please describe the license structure and how many licenses are recommended based on your proposal/associated costs in your budget narrative.

APPENDIX B
Dispatch Tool Budget

		Year 1	Year 2	Year 3
Initial Costs*				
	Product			
	Customization			
	Hardware			
	Installation			
	Report Development			
	Sub-total:	0	0	0
Ongoing Costs				
	Annual product support			
	Support for existing customizations			
	Sub-total:	0	0	0
Application Software				
	Application (label and repeat by application)			
	Cost of license			
	Support and Maintenance			
	Sub-total:	0	0	0
One Time Implementation Services				
	Service (label and repeat by service)			
	Hours			
	Hourly Rate			
	Sub-total:	0	0	0
Customizations				
	Customization (label and repeat by customization)			
	Sub-total:	0	0	0
	TOTAL:	0	0	0

* Please describe the license structure and how many licenses are recommended based on your proposal/associated costs in your budget narrative.