

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

PROPOSER INFORMATION

Organization Name: CitizenInsights (A project of GreatNonprofits)

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PROPOSAL INFORMATION

Date Submitted: 12/29/2016

Amount Requested: \$796,500

REFERENCES

Provide the name, affiliation and contact information [include email address and telephone number] for three references who are able to address relevant experience with your organization.

Please do not use employees of the Allegheny County Department of Human Services as references.

CitizenInsights Response:

Gregg Behr, executive director of the Grable Foundation, GreatNonprofits board member, and funder of the 2016 Pittsburgh Street Chats Survey

Professor Kevin Kearns, PhD, University of Pittsburgh Graduate School of Public and International Affairs, research advisor to CitizenInsights

Bill Crane, former director of engineering at LinkedIn, GreatNonprofits board member

REQUIREMENTS

Please respond to the following and submit only one Response Form, even when proposing Solutions for multiple categories. Proposers should leave the sections blank that they are not proposing and complete

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

only the sections for the categories they are proposing. Each category will be scored separately and the maximum score for a category is 50 points. Attachments do not count towards page limits.

Proposers may complete one or multiple of the following sections:

- A. Collecting Client Experience Data and Feedback (50 points)
- B. Harvesting and Analyzing Social Media Content (50 points)
- C. Implementing New or Existing Rating Tools (50 points)
- D. Engaging Individuals and Communities in Public Planning Processes (50 points)
- E. Other Innovative and Creative Solutions (50 points)

A. Collecting Client Experience and Feedback (50 points). If you are proposing a Solution for this category, fill out the questions below. If you are not proposing a Solution for this category, leave this section blank and move to section B. Your response to this section should not exceed 15 pages.

1. Describe your organization’s Solution for category A, Collecting Client Experience and Feedback.

A. Introduction:

Our understanding:

We appreciate DHS’ strong focus and desire to improve service delivery by using technology to expand and enhance the way DHS understands client experiences and enhance how DHS incorporates the “voice of the clients” in delivering services.

We understand DHS’s request for HIPAA-compliant technology solutions to engage a meaningful number of hard-to-engage clients, encouraging clients to freely voice their opinions and ideas regularly, without fear, and engaging clients across a wide range of technology capacity. These are all significant barriers associated with traditional survey methods when applied to hard-to-engage clients of DHS.

Our approach:

Our experience developing technology to collect feedback from 10,000 human services clients via the GreatNonprofits website and 7,000 human clients via the CitizenInsights SMS platform has given us a complex understanding of human services clients—their diverse motivations, technology constraints, needs, and preferences.

We’ve seen that technology—even if it’s one built specifically for this audience—by itself does not solve the challenge of engaging these hard-to-engage clients. Technology has to be paired with appropriate client-centered communications plans and strategies that build trust and appeal to the motivations of people who we want to engage.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Our team includes engineers, but also social scientists from public health, education, and psychology. Together we have developed technology as well as a client-centered communications and survey design strategy that is culturally appropriate, methodologically rigorous, and practical.

Solution Summary:

The CitizenInsights SMS is a client-centered solution designed to overcome the challenges faced by human services organizations in reaching hard-to-engage clients. The solution has been developed over the past eight years based on our experience in collecting experience data and feedback from hard-to-engage clients.

The solution has three unique components:

1. Client-Centered Technology: CitizenInsights SMS (short messaging service, aka texting) has been proven to be one of the most simple, inexpensive, and convenient ways for clients to regularly provide feedback data. SMS is well-suited to collecting feedback from transient populations. Eighty-five percent of low-income respondents regularly used SMS. SMS produces high response and high-quality surveys for difficult-to-reach populations. And because of the speed of SMS, clients can provide real-time data about their client journey through the DHS system as well as about previous service interactions.

For those with disabilities, CitizenInsights' IVR surveys allow a client to dial a number and provide answers to audio-delivered surveys. Through this flexible technology, DHS can effectively engage clients with a wide range of technological capacities and disabilities.

CitizenInsights' SMS platform would also enable DHS to collect qualitative client experience and feedback. As described in detail in Section E, the technology can capture images taken by clients with their cell phone.

Furthermore, this proven, turnkey technology can accelerate time to implementation: We can accelerate time to launch of the pilots, and mitigate risk, by customizing the CitizenInsights SMS, IVR, website solutions, and reference architectures for DHS's needs.

2. Client-Centered Survey Program: The CitizenInsights Client-Centered Survey Program has proven to enable human services organizations to efficiently and regularly collect feedback from their clients. The program is a comprehensive communications and survey design strategy based on a trust-building approach, with understanding of the behaviors, motivations, and preferences of low-income and hard-to-engage individuals. SMS surveys executed with this program get response rates between 7% and 40%.

The program was developed as a result of experience in engaging hard-to-reach populations (e.g., homeless, low-income, communities of color, immigrants, individuals with limited English proficiency) and our learnings about best practices.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

3. Management & Collaboration Process: We have an established project framework consisting of these three phases—Development, Implementation, and Knowledge Transfer & Training. We are experienced in advising, collaborating, and project managing survey projects with a wide variety of human services organizations through the phases of using the SMS client feedback solution. We provide know-how and specialized skill sets across the various technology, communications, data analytics, data visualization, and survey design domains. Our clear, well-governed process ensures that milestones and KPIs are met or exceeded.

Solution Deliverables

CI proposes to develop and implement a client experience and feedback solution by developing and implementing at least 20 surveys for DHS programs and/or human services providers with a target of a minimum 10% response rate and an opt-in rate of 80% for future surveys. Surveys will be sent to participants using SMS with an IVR option.

Results will be visible in the DHS custom dashboard that reflects DHS's KPIs. Over the course of this project, survey design and outreach will be optimized and knowledge transferred so that DHS can take over operation of the solution and scale it across agencies and affiliated organizations.

The CitizenInsights Technology team will, in collaboration with DHS's Technology/IT team, tailor the technology solution to run in DHS's environments. The CitizenInsights program engagement director, VP of research, and data account team will tailor the Client-Centered Survey Program—including communications, survey design, processes, timelines, and checklists—to DHS's environment. The CitizenInsights Research and Technology staff will also tailor the survey analysis tool, reports, and dashboards to DHS's environment.

Regarding integration with existing DHS solutions: We recognize that DHS collects client feedback via many types of channels such as in-person interviews, online surveys, mail-in postcards, etc. We will work with DHS to incorporate data from these channels into the analyses and visualizations. We also recognize that DHS also manages the Data Warehouse, which aggregates and stores information from many other external sources of data. We will work with DHS to design data exports from our solution that preserve anonymity but also allow for long-term DHS storage.

Features & Benefits of CitizenInsights Solution:

Benefits for Clients: Simple, convenient, compelling

- Clients receive surveys that are suited to their preferences and technology limitations
- Clients get personalized incentives to participate
- Clients can see summary results of surveys they participated in

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

- Clients can get compelling, personalized surveys based on criteria such as the client's demographics, history, and previous survey answers
- Clients can receive surveys when they are most likely to respond (i.e., at real-time, point-of-service interactions)

Benefits for DHS: Meaningful, regular, client experience and feedback data

- Get higher response rates
- Conduct point-of-service surveys
- Conduct longitudinal research
- Collect or send qualitative information, including photos and videos
- Get results fast: Average survey completion time is within two hours

Technology Detail:

The design of the system will connect and convert structured feedback from the field in a secure way that delivers insights for relevant DHS teams. Each component is built for scale, flexibility, and security by using enterprise solutions. We use industry standard security and encryption technologies, hosted on HIPAA-compliant cloud.

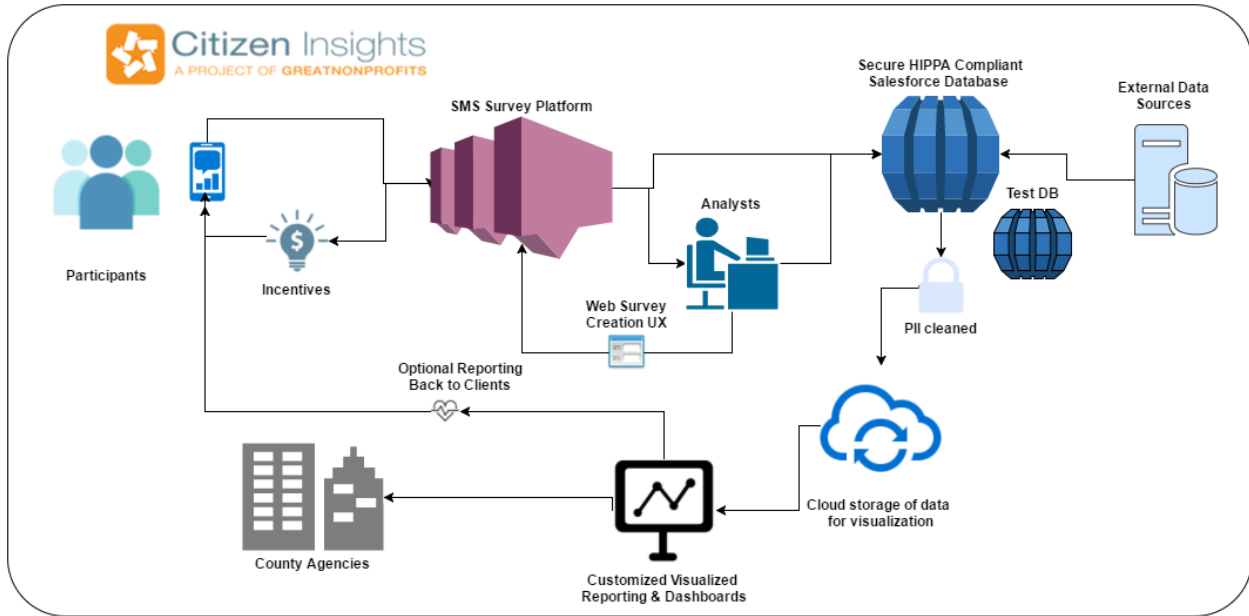
Survey creators are able to generate contact lists from the database and create custom surveys through the SMS system interface. Our secure servers can process thousands of messages simultaneously. Collected responses are stored in a secure, HIPAA-compliant database. For anonymity and HIPAA compliance, collected data is automatically wiped of personally identifiable information. The customizable back-end database integrates with the most popular third-party CRM and email providers and can be easily extended with our API.

Data are imported into systems like R, Python, and Tableau to generate dynamic dashboards for the DHS team. The dashboard can display a variety of charts, graphs, maps, and tables.

Automated reports are created with scripts that update presentations and reports for repeated surveys with the latest data from the platform. PDF and HTML reports can be easily distributed through DHS's intranet or to relevant DHS stakeholders.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement



Integration into DHS Systems and Processes: Our REST API allows DHS to push out surveys through its current client management system. The API allows DHS to summarize, reformat, and slice and dice data using other technology tools.

Ongoing Sustainability

After completion of the scoped project, the solution—both the Technology as well as the Client-Centered Survey Program—can be fully executed by DHS staff. We believe that running 20 surveys outlined in this proposal will result in a customized Technology and Survey solution that is flexible and meets DHS’s future needs. DHS would have infrastructure in terms of tailored survey instruments, dashboards, and reporting frameworks—as well as training resources, established processes/routines, and trained staff—to sustain the program. DHS can choose to license the Technology or continue to use CI’s services on a negotiated services contract.

2. Describe your organization’s experience with developing, implementing and evaluating Solutions to regularly and efficiently collect client experience and feedback. Provide examples of relevant work and include links, images and/or attachments as necessary.

We have experience working with partners in human services—nonprofits and foundations—across the life cycle for collecting feedback and engaging hard-to-engage clients.

Developing & Evaluating Solutions:

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Our program director is the point of contact from beginning to end for each project. Their role is to ensure the project's success, beginning to appropriately scoping the project. In developing solutions, our team will conduct four to six meetings with their counterparts in the DHS—such as Technology, Communications, and Data Analysts—to understand fully DHS's needs, timelines, and priorities. The most important question we ask is “What decisions are you trying to make, and how can feedback data help you make those decisions?” This is a process of discovery that is critical to enabling our team to develop the most appropriate solution for DHS. If there is a need for external domain expertise, CitizenInsights can identify and manage external experts. We are affiliated with Stanford and University of Pittsburgh professors in areas of health, education, and public policy who assist in research design and provide expert commentary on results and analysis.

Implementing Solutions:

Once appropriate goals, strategies, hypotheses, key performance indicators, milestones, budget, technology choices, and deliverables are determined, our team works together to implement the chosen solutions. We conduct daily standups for each of the teams: Technology, Communications, and Data Analysts. Implementation time ranges between one and six weeks depending on the project's complexity. The program director is in touch with each of our teams to ensure that milestones are met, on time and within budget. The program director provides updates at scheduled check-ins with our partner and their team. The program director manages the teams to ensure that key performance indicators—such as a meaningful number of clients gave feedback, that the survey results are robust, and that the data analysis and visualization are useful—are met.

At the end of each phase of the project, there is a checkpoint where the CitizenInsights team will meet with the DHS team to review the progress and ensure that we are on track, and also to make any adjustments as necessary if new information arises or conditions change.

Evidence of Experience

Example Project: Feedback on Enrollment Processes of Government Program

Background:

There were anecdotal reports of problems with enrolling in Obamacare in California, however there was no concrete qualitative or quantitative data on what the problems were with walk-in, phone, and Internet enrollment and how they could be overcome. Our partner, a large statewide foundation, was also interested in relevant information that could help predict whether clients would be likely to get preventative services from a doctor.

Challenge:

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Our team of psychologists, communications specialists, engineers, and product managers assessed a number of web-based solutions but decided on SMS because of its broad use by low-income people. We worked with Stanford University's SPARQ Center to design friendly and simply phrased questions in Spanish and English.

Outcome:

We used the CitizenInsights Client-Centered Survey Program (ex: trust-building recruitment methods) to recruit 900 low-income Californians. Our groundbreaking 2015 report highlighted the enrollment experiences from nearly 900 low-income Californians. The study was highlighted in *California HealthLine*, and reached 1,000 key California policymakers. Report here:

<http://www.citizeninsights.org/unitedways-street-chat>

Press here: <http://californiahealthline.org/news/state-has-good-care-if-you-can-get-it-according-to-textmessaging-study/>

Additional Projects: We also developed, implemented, and evaluated client experience and feedback solutions for these projects:

- [Awareness of Earned Income Tax Credit and Experience with Free Tax Preparation Services](#)
- [Quality of Life in Low-Income Neighborhoods in Pittsburgh](#)
- [Attitudes and Behaviors of Low-Income Latinos About Diabetes](#)

Our Clients: We've developed, implemented, and evaluated client experience and feedback solutions: Remake Learning, The Grable Foundation, The Heinz Foundation, El Camino Hospital, The California Endowment, The United Ways of California.

"The groundbreaking use of text messaging as a survey strategy in this project will inform the work of others examining the experiences of underserved Californians." —Padmini Parthasarathy, Program Director, California Wellness Foundation

"This data gives us validation we needed that we should continue to invest in web resources for low-income families with children." —Gregg Behr, President, The Grable Foundation

Our Leadership in This Field of Client Engagement and Feedback:

Publications & Speaking on Client Feedback and Engagement Publications include:

- "Nothing About Us Without Us" Approach Transforms Foster Care in Florida. By understanding what beneficiaries think works and doesn't work, foundations and nonprofits can provide better programs, *Stanford Social Innovation Review*, April 23, 2012. URL: https://ssir.org/articles/entry/nothing_about_us_without_us_approach_transforms_foster_care_in_florida

RFP Response Form

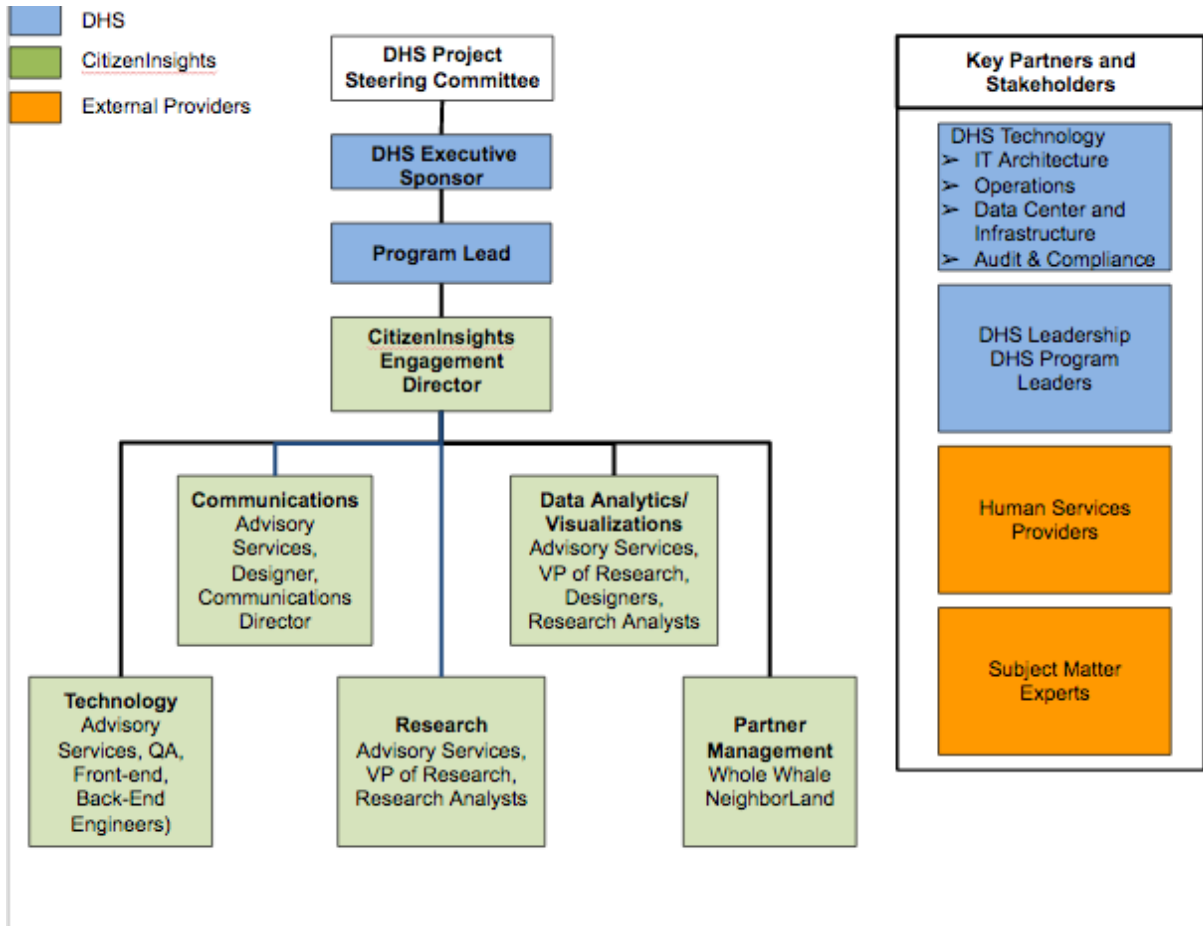
Technology Solutions to Enhance Client Feedback and Community Engagement

- Community Voices for Social Good. We need a more systemic and accessible way for underserved individuals to share their beliefs, insights, and experiences directly with policymakers, nonprofits, and their own communities. *Stanford Social Innovation Review*, Dec. 9, 2015. URL: https://ssir.org/articles/entry/community_voices_for_social_good
 - Get Feedback. It is essential to build direct consumer feedback into funding criteria for government and nonprofit programs serving low-income. *Stanford Social Innovation Review*, Summer 2012. URL: https://ssir.org/articles/entry/get_feedback
Conferences include:
 - Greater Pittsburgh Nonprofit Partnership Nonprofit Summit (2008 and 2012)
 - Independent Sector Annual Conference
 - Data for Good 2016
 - Stanford Data for Purpose 2016.
3. Provide staff bios (not CVs) of the key staff who will be implementing your Solution and identify the main point of contact. Describe your management structure and how it will support the goals of your proposed Solution. If you are partnering, describe the structure of the partnership.

The following represents the management structure for this project.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement



Role	Key Responsibilities
CitizenInsights Allegheny Program Director	Provide leadership, oversight, and management of our overall relationship with DHS Organize and lead the project phases, establish accountability, regular check-ins with DHS, activities, milestones, budget, and manage risks based on the established project plan Work with the DHS leadership team to assess the level of service quality and the degree of satisfaction with CitizenInsights services Review weekly status reports across workstream meetings to review issues and risks that need action
Communications Project/Program Management	Manage program schedule, activities, and deliverables dates related to Communications
Research Project/ Program Management	Manage program schedule, activities, and deliverables dates related to Research methods

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Technology Project/Program Management	Manage program schedule, activities, and deliverables related to Technology development, assessment, and evaluation.
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Relevant Bios of Key Team Members and Time Available

Perla Ni, CEO and Founder of CitizenInsights, 50% FTE

Perla has managed multiyear, multimillion-dollar budgets at Stanford and partnerships with California Endowment and the Heinz Endowments. She has a JD from Harvard Law School, and BA in psychology from UC Berkeley. She is a leading author and speaker on community feedback for social services. She has overseen more than half a dozen research survey initiatives on client feedback using SMS surveys.

Nancy Brucker, CitizenInsights Allegheny Program Director, 100% FTE

Nancy leads all projects in Pittsburgh, assisting clients with program transformation, strategy, survey research, and technology. Nancy has 10 years of experience in health services and evaluation research and three years of experience in technology consulting. She has a master's of public health from the University of Pittsburgh. She's previously worked in qualitative and quantitative evaluations at the Center for Health Equity Research, Pittsburgh VA Medical Center, and Highmark Caring Place.

Aimen Barma, VP of Marketing & Partnerships, 30% FTE

Aimen has more than 30 years of marketing and partnerships experience at companies such as Ancestry, Audible, PayPal, and YouCaring.

Jacob Model, VP of Research, 40% FTE

Jacob helped to define the Massachusetts Department of Elementary and Secondary Education's standards and assessments strategy as part of the \$250 million Race to the Top grant application. He was a research associate at HBS and a consultant at The Bridgespan Group. He is a PhD candidate (expected 2017) in OB at Stanford Graduate School of Business.

Jake Solomon, Head of R&D for CitizenInsights, 20% FTE

Jake has key experience in public policy research, including rigorous survey methodologies, from his time at the RAND Corporation. His work at Code for America also offers important experience in building effective software for low-income populations to access government services.

Alana Conner, PhD, Communications Expert, 20% FTE

Alana is cultural scientist who studies, writes about, and consults on culture, psychology, and health. She has a PhD in social psychology from Stanford and was a postdoc fellow at UCSF, where she focused her research on social class differences in decision making and health.

Chris Johnson, CTO, 20% FTE

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Chris was the CTO of Crisis Text Line, built the platform, infrastructure, and original engineering team that powers a national, 24/7 mental health SMS crisis line.

4. Provide a detailed budget that clearly supports your Solution and implementation plan. Include a narrative that explains and justifies each budget item and how amounts were calculated. You may provide the budget and budget narrative as an attachment.

See Budget and Budget Narrative: Attachment A.

5. Describe your understanding of the challenges inherent in implementing your Solution and how you plan to address those challenges.

Challenges	Solutions/Mitigations
Designing questions that lead to actionable data	A dedicated CitizenInsights program director will be available to meet with DHS staff in person and on-site at your different locations. She will conduct trainings for DHS staff to facilitate planning sessions for the surveys. “What decisions am I trying to make? What data from clients will help me make that decision?”
Low volume of feedback by clients	CitizenInsights’ Client-Centered Survey Program includes communications strategies such as: create more personalized outreach messages; share stories with clients about how feedback has made a difference; or share survey results with clients.
Integration with DHS technology environment	A thorough understanding of the DHS technology environment and requirements during the development phase.
Receiving feedback from angry, mentally disturbed, frustrated clients	Not asking questions that may elicit emergencies. Add automated keywords to the surveys that will trigger an alert to end the survey with phone # to the DHS call center.

6. Provide a timeline for the design and development of your Solution.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

	Checkpoint	Checkpoint	Checkpoint
	Development	Implement	Training & Knowledge Transfer
Length	3-4 months	15-18 months	3-4 months
Goal	Define goals, strategy, milestones, Complete software development	Complete at least 20 surveys	Transition to DHS Operations
Major Tasks Activities	<p>Program Management: Planning and strategy sessions with DHS</p> <p>Technology: Define requirements with DHS teams and develop platform customization and dashboards</p> <p>Program: Share survey methodologies with DHS teams, develop initial surveys and reporting requirements</p>	<p>Program Management: Continued check-ins with DHS project leadership team</p> <p>Technology: Refine dashboards and visualizations; develop integrations with existing DHS solutions</p> <p>Program: Development of 20 surveys and appropriate outreach strategies; survey execution; analysis of data</p>	<p>Program Management: Continued check-ins with DHS project leadership team with focus on knowledge transfer and training</p> <p>Technology: Document system operations and train appropriate DHS personnel; API guide</p> <p>Program: Training tool such as webinars developed to facilitate scaling of system through DHS</p>
Participants	CitizenInsights Technology and Program team members; DHS Technology, Data, Program teams	CitizenInsights Technology and Program team members; DHS Technology, Data, Program teams	CitizenInsights Technology and Program team members; DHS Technology, Data, Program teams
Outcomes	<ul style="list-style-type: none"> > Thorough understanding of DHS technology environment > Internal and external reporting established > Initial partner programs ready to execute surveys > SMS platform and database customized > Dashboard developed > Survey design and analysis plans complete 	<ul style="list-style-type: none"> > 20 surveys conducted > Dashboard provides real-time and ongoing analysis of results > Growing pool of clients providing feedback 	<ul style="list-style-type: none"> > DHS technology team can run system effectively > Use of survey platform can be easily scaled across DHS agencies

7. Describe your organization’s plan to collaborate with DHS during development, implementation, knowledge transfer and training about how to use and maintain the Solution.

We understand that significant collaboration with DHS is required toward the end goal of empowering DHS to create its own successful client-engagement surveys. CitizenInsights, in collaboration with DHS, will put in place governance processes and mechanisms in order for the project to achieve the expected outcomes.

Our approach to collaboration involves engaging DHS teams in the two main domains—Technology and Program—during each of the three phases of the project:

Development Phase: The CI engagement director will organize planning and strategy sessions between our project leadership team and the DHS project team to define the goals, strategy, milestones, and time frames. We will clearly define roles and responsibilities, schedule for regular check-ins, and best processes for communication. CitizenInsights Technology and Program Team members will engage with the DHS counterparts. During the phase we will define customizations for Technology (especially how the Technology will integrate with DHS systems) and for the Client-Centered Survey Program that best

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

work with DHS. For specific detail on how we will engage DHS's IT, Data, and Program teams, please see Budget Narrative for more detail.

Implementation Phase: Regular check-in sessions between CI leadership team and the DHS project teams to ensure that milestones and deliverables are met. During this phase, we will be implementing surveys and collecting data. We can make refinements to set goals, strategies, and time frames, as requested by DHS. Teams will again, collaborate with their respective counterparts. For specific details on how we will engage DHS's IT, Data, and Program teams, please see Budget Narrative.

Knowledge Transfer & Training Phase: To ensure that DHS staff are fully equipped to sustain the solution going forward, multiple training formats and channels will be provided. These may include: 1) In-person training; 2) Webinar; 3) On-demand video; and 4) Technical documentation. For specific details on how we will engage DHS's IT, Data, and Program teams, please see Budget Narrative.

8. Describe how your organization will evaluate the success of your Solution. Provide an example of how you measured the impact and success of a similar project in the past.

Success measurements may include, but are not limited to, KPIs such as: client engagement (numbers of clients opting in, response rate, completion rate); client satisfaction (clients reporting that they would be willing to take future surveys); client feedback led to program changes; and operational metrics such as whether the project was delivered on time and within budget.

Example: Client Feedback Leads to Shift in Focus

Remake Learning, a nonprofit based in Pittsburgh, wanted to understand whether low-income people knew about their free educational activities. The organization used the CitizenInsights SMS survey platform and panel of low-income people to conduct a survey of low-income parents in McKees Rocks and the Hilltop neighborhoods.

Results: The survey got an excellent response rate of 23%. The survey results showed a strong interest by parents for educational activities (60%) for their children, yet low awareness of Remake Learning's services. As a result of these findings, Remake Learning staff decided to allocate their resources next year toward outreach to low-income parents. Operationally, Remake Learning was able to get data on time, within budget, and provided positive feedback on the experience of working with CitizenInsights.

9. Describe why you want to serve human services clients, your experience in adapting technology to serve human services clients and your plan to adapt your Solution to meet client needs for this category.

We want to serve human services clients because it is part of our nonprofit mission. Since our inception, we have built technologies and programs to serve the needs of human services clients

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

and the organizations that serve them. We were founded in Pittsburgh, Pa., with funding from the Forbes Funds. Our founding partners were human services organizations such as North Hills Community Outreach and Human Services Corp. in Allegheny County. We have been adapting technology for nonprofits for more than nine years. Our plan is to customize and extend our technologies, expertise, and client-centered program to meet the needs of hard-to-engage clients served by DHS and human services providers.

B. Harvesting and Analyzing Social Media Content (50 points). If you are proposing a Solution for this category, fill out the questions below. If you are not proposing a Solution for this category, leave this section blank and move to section C. Your response to this section should not exceed 15 pages.

10. Describe your organization's Solution for category B, Harvesting and Analyzing Social Media Content.

Introduction:

CitizenInsights has partnered with Whole Whale LLC, a consultancy on social media strategy and digital analytics. Their social media expertise, use of technology, focus on working with nonprofits, and reputation for service are some of the many reasons why we trust them to provide a Solution for this category.

Our Approach:

The goal of the social media solution is to provide a full 360 solution, complementing other methods of collecting client feedback. The social listening will be focused on client and community comments, needs, wants, search terms, and complaints.

Our approach will include both social media listening and broader digital behavioral listening that extends to keyword search information on and off agencies' and organizations' websites. As discussed in additional detail below, our approach will be broken up into the following three phases: Phase I—Discovery and Implementation; Phase II—Analyzing and Refining Dashboards and Quarterly Reports; and Phase III—Trainings and Leave Behind.

For harvesting and analyzing social media content, we'll use a third-party social listening tool such as Salesforce's Social Studio, Hootsuite, or Crimson Hexagon, each of which we've used in the past. As part of the discovery and implementation phase, working with DHS agencies and affiliate service providers we'll select and implement the social listening tool that best suits the needs of the health and human services clients, Allegheny County communities, and DHS agencies and select service providers. We've a preference to use Salesforce's Social Studio, as a key component in our survey solution in Part A includes a customized Salesforce database, but the selection of the social listening tool will ultimately depend on DHS agencies' needs and the allocated budget for the social listening tool.

With the tool selected, we'll brainstorm with DHS agencies and Allegheny County health and human services experts to determine the keywords associated with clients' and communities' comments,

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

questions, and complaints, and develop buckets of related keywords, including long tail keywords and everest keywords, for which to monitor. The keyword buckets will include both branded keywords (i.e., keywords and phrases that include specific DHS agencies and organizations branded names) and non-branded keywords (i.e., keywords related to organizations' services and comments and complaints about such services). Further, we'll discuss and develop a qualitative social media system, which will include specific hashtags designed for client and constituent feedback.

Once we've created our keyword buckets and developed our qualitative social media hashtags, we'll then set up and customize the social listening tool to monitor client and community social media activity across sites, such as the Facebook and Twitter pages of DHS agencies and their affiliate service providers, and any Allegheny County online review sites. The social listening tool will then drill down to the client post level, catching every comment, and listening for relevant client and community messages, both on and off platform, identifying relevant client and community trends, opportunities, and concerns across Allegheny County. The tool will also be configured to generate custom dashboards and reports that summarize the listening data, which dashboards and reports will then be reviewed and analyzed with DHS agencies and select service providers on a quarterly basis (or more frequently, if necessary).

In addition to setting up and customizing a social listening tool, our social listening strategy will include broader digital behavior listening, which extends to keyword search information both on and off DHS agencies and affiliate service provider sites. In coordination with DHS agencies and their affiliates, we'll use platforms such as Google AdWords, Google Analytics, and Google Search Console to determine the relevant topics and keywords that clients and communities are searching around in the field of health and human services, and we'll configure such platforms to monitor relevant web search behavior. To determine relevant search behavior, we'll use a keyword mapping strategy. The keyword mapping strategy will be developed by discussing relevant health and human service concerns with DHS agencies and select service providers, identifying keywords—including both long tail keywords and everest keywords, developing buckets of related keywords, and then using Google AdWords, Google Analytics, and Google Search Console to listen for and harvest what clients and community members are searching for or looking to comment or complain about. We've found, most specifically in our work with Planned Parenthood (discussed below), that in the health and human services field, often times search behavior is more indicative of health and behavioral trends than social media behavior given the sensitive nature of health and human services needs and information. This solution also allows for anonymity, as it tracks broad search trends, as opposed to individual posts and comments. Like the social listening tool, we'll configure Google AdWords, Google Analytics, and Google Search Console to generate custom dashboards and reports, and we'll then review and analyze such dashboards and reports with DHS agencies and select service providers on a quarterly basis (or more frequently, if necessary).

With both the social listening tool and Google AdWords, Google Analytics, and Google Search Console installed and properly configured, we will harvest and analyze relevant social media posts and digital behavior, information which will be summarized in the dashboards and reports, as noted above. Such dashboards and reports will be easy to interpret and user-friendly for DHS staff, and we will review such dashboards and reports with DHS staff and train DHS staff on how to further customize, review, and analyze such dashboards and reports. Further, based on the data and trends that we are finding, we will

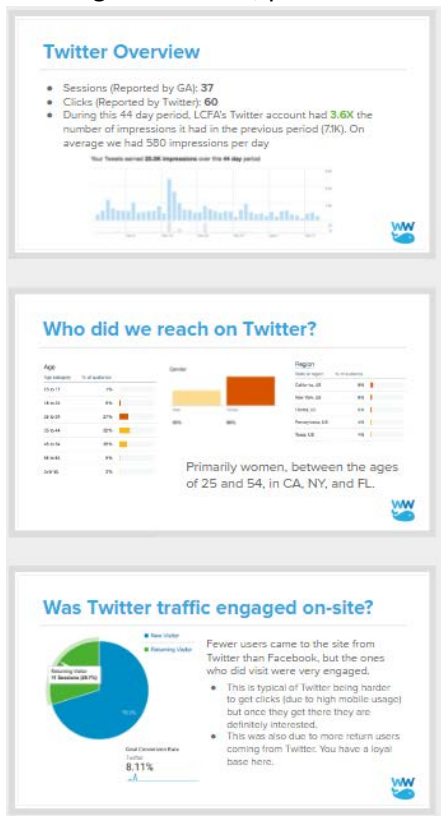
RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

refine both the formatting and style of the dashboards and reports, along with our methods of data collection. Finally, as an important part of our training of DHS staff and service provider staff, we'll develop training tools, such as video walkthroughs of the customized solution, to leave behind with DHS agencies and their affiliate service providers. Such strategies and solutions for harvesting and listening to social media content, all of which will be included in the customized training videos, can then be used widely across the Allegheny County health and human services sector, while simultaneously being adaptable to the specific needs of DHS agencies, affiliates, communities, and programs.

11. Describe your organization's experience with developing, implementing and evaluating Solutions to harvest and analyze social media content. Provide examples of relevant work and include links, images and/or attachments as necessary.

George Weiner, the CEO of Whole Whale, helped develop major social media listening strategies and implementation plans while serving as the CTO of DoSomething.org, and George has brought such strategies and implementation plans to Whole Whale's clients. Through this experience, we understand the value of various data sets, which is why we are recommending search data in addition to the social listening data. Below, please find several case studies that support this insight.



Case study: Lung Cancer Foundation of America

We worked on campaign design and tracking with the Lung Cancer Foundation of America on their annual social engagement campaigns—#30Days30ways (2015) and #LittleThings (2016). For each we

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

used on platform and third-party tools to track social activity and then create reports on the impact of the activity.

Our client found the insights and analysis we created far more valuable than simple volume reports that other social listening firms had previously provided. The summary slides to the right show how we approach the data with clear questions and then answer such questions with the relevant sources of data, which spanned Google Analytics, Social Report, and Twitter Analytics.

Case Study: Planned Parenthood Federation of America

For two years Whole Whale supported the national office with a broad range of web/digital behavior analytics needs. At one point we were asked to determine the relationship between general keyword interest, organic traffic, and actual local patient activity. We pulled together disparate sets of internal and external data to build a clear picture of the strong relationship that existed between patients and search behavior. This was a key insight for us to see the significantly stronger relationship that search behavior has on activity when compared to social media listening data. The chart below shows how we were able to regionally segment data by device in order to provide insights and create bird's eye view dashboards of social activity.



“Whole Whale is an excellent partner shop. Planned Parenthood Federation of America worked with Whole Whale to help us manage our very active website. George and his team of very talented staff are phenomenal. They dive right in to understand what we do and more importantly why we do it so they can help all of our stakeholders understand what they need and why. They then use this knowledge to deliver what we need in a very friendly way because they learned exactly what we need. Their team has technical knowledge and soft skills by the dozens! Something very rare in a tech shop. By assisting PPFA with this work Whole Whale has helped us deliver key reproductive information and services to millions of people in need.”

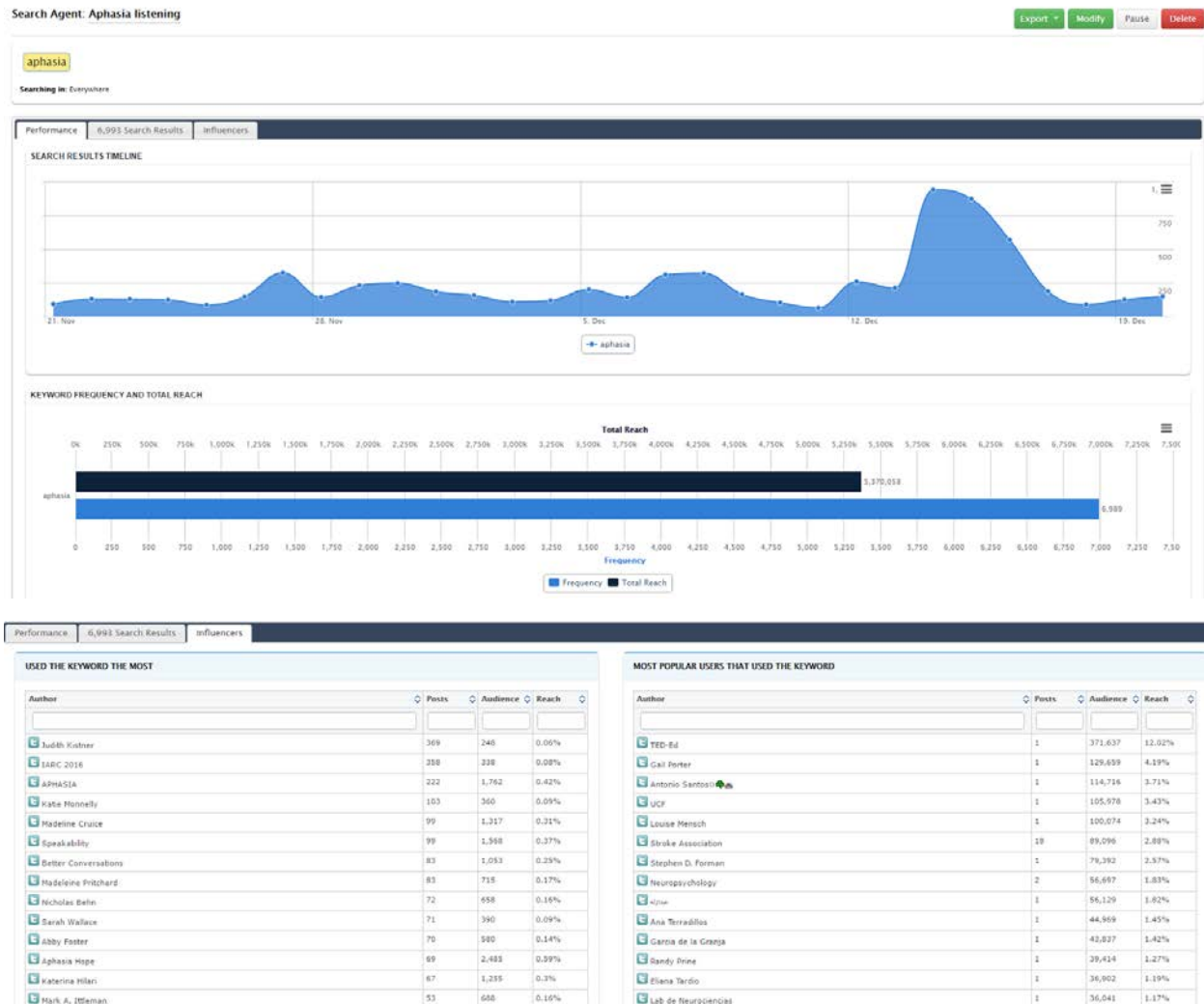
—Frank Rosado, CTO of Planned Parenthood Federation of America (July, 2014)

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Case Study: National Aphasia Association

For more than three years Whole Whale has worked with Aphasia.org to build awareness, digital engagement, and the analytic strategies to track impact. Over this time we have helped 7X traffic to Aphasia.org and helped their site become the go-to Google result for the topic of aphasia. A large component of our work is now polling and listening to national sentiment and national understanding of aphasia. Below is a snapshot of our listening tool dashboard that tracks volume/reach of conversation and identifies key influencers for the social team.



“Whole Whale has been the ideal digital partner for the National Aphasia Association for the last couple of years. Thanks to them, we have been able to overhaul and improve our presence on the web. They really understand how to get the most out of a nonprofit’s digital presence. From our website to our social network, the National Aphasia Association has been able to extend our reach and the awareness of aphasia with the help of Whole Whale.”

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

—Chad Ruble, CEO National Aphasia Association (July 2015)

12. Provide staff bios (not CVs) of the key staff who will be implementing your Solution and identify the main point of contact. Describe your management structure and how it will support the goals of your proposed Solution. If you are partnering, describe the structure of the partnership.

CitizenInsights and Whole Whale’s staff is well equipped to implement and manage the social media listening and harvesting strategy described in this section of our proposal, as we share a mission of leveraging data and technology to maximize the impact of nonprofit organizations.

The following CitizenInsights and Whole Whale staff members will lead the implementation and management of the social media listening and harvesting strategy:

Nancy Brucker, CitizenInsights Allegheny Program Director. Nancy leads all projects in Pittsburgh, assisting clients with program transformation, strategy, survey research, and technology. Nancy has 10 years of experience in health services and evaluation research and three years of experience in technology consulting. She has a master’s of public health from the University of Pittsburgh. She’s previously worked in qualitative and quantitative evaluations at the Center for Health Equity Research, Pittsburgh VA Medical Center, and Highmark Caring Place.

George Weiner: Whole Whale founder and CEO, and co-founder of PowerPoetry.org.

Relevant Experience:

- George was the CTO of DoSomething.org. Under his leadership, DoSomething.org became an innovator in social media, mobile technologies, and social cause. During his seven years at DoSomething.org, he dealt with major social media listening strategies and implementation, and he oversaw the complete overhaul of the site twice (winning a Webby Award and nominations), helping to build a community of more than 1.5 million young people taking action.
- Since 2010, George has worked with more than 50 nonprofits to increase cause awareness, multiply meaningful online engagement, and train teams to implement strategic use of data and technology.

Laura Clevenger: Account Manager. Laura is expert in setting up analytics, mapping out digital impact, and training capacity into top nonprofits. Laura is Google Analytics and Google AdWords certified.

Relevant Experience:

- Laura worked at TMI Agency (housed within DoSomething.org), managing and analyzing data from a teen research panel for a Fortune 500 company.
- While receiving her BS in public health from NYU, Laura spent most of her time researching health disparities in the U.S.-Mexico border region and working as a research data associate at NYU Medical Center. Over the past two years, Laura has helped improve the impact of

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

organizations that include the Malala Fund, Charity Miles, The Century Foundation, and Donate Life.

Chris Johnson: Technology Strategies. At Whole Whale, Chris helps plan technical implementation to maximize impact while minimizing effort and cost, helping Whole Whale answer the age-old question of “build or buy?”

Relevant experience: Prior to Whole Whale, Chris was the CTO of Crisis Text Line, built the platform, infrastructure, and original engineering team that powers a national, 24/7 mental health crisis line over messaging services, including SMS, Facebook, and Kik, and helped move DoSomething.org to the cloud.

Zach Blodgett: Business strategy and development team. Zach is committed to using digital strategy and analytics to achieve social change. Prior to Whole Whale, Zach worked for the Salvation Army, where he negotiated the organization’s major contracts, directed the contract procurement team, helped develop program logic models, and advised senior personnel on financial matters and business strategy. In directing the contract procurement team, Zach led the Salvation Army team that was awarded a multimillion, multiyear contract with the City of New York to operate Salvation Army prekindergarten classes and programs. While at the Salvation Army, Zach also worked closely with the Human Services Council to improve business relationships between the nonprofit sector and the City of New York.

Whole Whale has a semi-flat organization structure, with biweekly accounting on productivity goals and biweekly sprints to manage all client work and ensure projects are delivered on time and above expectation. As Whole Whale does for all projects and clients, Whole Whale will assign an account manager to work in close coordination with CitizenInsights and DHS agencies and affiliate service providers to manage the social media listening and harvesting. The account manager—most likely Laura Clevenger—will work closely with CitizenInsights and DHS agencies and affiliates to do the following: establish project goals and priorities; establish the specific steps and timeline to prioritize and achieve project goals; manage the setup and configuration of the third-party social listening tool; configure Google AdWords, Google Analytics, and Google Search Console; and review and analyze the dashboards and reports generated from the third-party social listening tool and Google AdWords, Google Analytics, and Google Search Console.

13. Provide a detailed budget that clearly supports your Solution and implementation plan. Include a narrative that explains and justifies each budget item and how amounts were calculated. You may provide the budget and budget narrative as an attachment.

Phase	Major Tasks	Year 1	Year 2	Narrative
Phase I— Discovery and Implementation	Social Listening Tool	30,000	18,000	Licensing fee for third-party social listening tool - \$2,500.00/month in year 1 and

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

				\$1,500.00/month in year 2.
Phase I— Discovery and Implementation	Discovery	30,000		Selecting third-party social listening tool; determining what people comment and complain about; determining keywords and phrases to monitor. \$150/hour for 200 hours.
Phase I— Discovery and Implementation	Implementation of Tools and Reports	30,000		Implementation of tools and customizing dashboards and reports. \$150/hour for 200 hours.
Phase II— Analyzing and Refining Dashboards and Quarterly Reports	Custom Quarterly Reporting	10,000	20,000	Analyzing, discussing, and refining dashboards and reports. \$150/hour for 200 hours.
Phase III— Trainings and Leave Behind	Training and Resources		25,000	Creation of and training on leave behind resources and training videos. \$150/hour for 167 hours.
	Total Costs	\$100,000	\$63,000	\$163,000

The total budget for harvesting and analyzing social media content will be \$163,000. Below, please find a more detailed budget narrative.

Social Listening Tool

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

The estimated cost of the social listening tool is \$2,500/month in year one and \$1,500/month in year two—the year one cost being higher as we test keywords for which to listen and customize the social listening tool. Should Allegheny County wish to maintain original year’s keyword volume, including non-essential keywords, then additional costs could apply. For social listening, we will most likely use one of the following third-party platforms: Salesforce’s Social Studio, Hootsuite, or Crimson Hexagon.

Discovery

The discovery phase will cost \$30,000 (\$150/hour for 200 hours). Discovery will include asking DHS agencies and their affiliate service providers what people complain about; gathering such keywords and phrases; mapping such keywords and phrases; and then listening for such keywords and phrases.

Implementation of Tools and Reports

The implementation of tools and custom configuration of dashboards and reports will cost \$30,000 (\$150/hour for 200 hours).

Custom Quarterly Reporting

Analyzing and discussing dashboards and reports, and refining reports for regional targeting based on prior listening will cost \$30,000 (\$150/hour for 200 hours).

Creation of and Training on Leave Behind Resources

The creation and leave behind of resources—including, but not limited to video walkthroughs of the customized solution—will cost \$25,000 (\$150/hour for 167 hours).

14. Describe your understanding of the challenges inherent in implementing your Solution and how you plan to address those challenges.

Below please find a chart of the challenges associated with harvesting and analyzing social media content along with our solutions/mitigations to such challenges.

Challenges	Solutions/Mitigations
Identifying DHS-funded service providers	We will work with DHS agencies and other Pittsburgh-area health and human services influencers to identify DHS-funded service providers that would be willing and excited to partner with us on our solution. With the vast number of service providers in Allegheny County, we’d rather work with fewer organizations that understand and have bought into the power and necessity of digital analytics. If social media and digital behavior listening must be converted to customer service response, this will require more

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

	<p>in-depth connection to the service providers and their accounts.</p>
Identifying relevant posts	<p>Working with DHS Agencies, DHS Agencies' affiliates, and other Pittsburgh-area health and human services influencers, and surveying such parties, we will determine the programs, topics, and keywords and phrases that clients and the community are posting about or searching for. Relevant posts will be less important than macro trends. As indicated above, if social media listening must be converted to customer service response, this will require more in-depth connection to the service providers and their social media accounts and social media teams, unless there is a county-wide social media team able to spend the time and resources to respond to key posts.</p>
Lack of social media data	<p>Based on our preliminary research, it's a very real possibility that during this two-year test the volume of relevant social media activity across Allegheny County will not be voluminous enough to draw program conclusions and develop program solutions to such social media activity. As part of our analysis, we will use standardized measures of performance and impact to assess whether or not this type of social media harvesting and analysis is something Allegheny County should continue to pursue and pay for in the future.</p> <p>The potential lack of social media data is also why we're strongly recommending broader digital behavioral listening and harvesting that extends to keyword search information on and off organizations' websites. We believe broader digital behavioral listening and harvesting will provide a better understanding of clients and needs than social media listening and harvesting.</p>
Isolated/siloed data across service providers	<p>Given the number of service providers across Allegheny County, this is a real challenge. We could create master view only permission to service provider accounts, as well as across counts search listening—this would require participation of DHS-funded service providers. With service</p>

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

	provider participation, we could potentially establish deeper levels of participation with access to individual service providers' social media accounts, Google Analytics accounts, and Google Search Console. With the participation of only a small number of service providers, we will still find enough aggregate data to run a viable test of the social media harvesting idea and concept. Further, Twitter and Instagram have open information that we can listen to and Google AdWords is open, where we can tell search volume.
Different interactions with social media and different social media sites	The third-party social media listening tool we will select and implement will allow for parsing the disparate data sources and will aggregate the data into easy-to-understand dashboards and reports.
Trade-off between depth and breadth of information retrieval	The specific depth and breadth of information retrieval will be determined during the discovery phase of our solution. Twitter will be the easiest social media platform to aggregate data from, while Facebook will prove harder and require deeper levels of access to DHS agencies and service providers' account information. For digital behavioral listening and harvesting that extends to keyword search information on and off organizations' websites, this is less of an issue as such listening and harvesting requires significantly less participation and access to accounts than social media listening and harvesting.

15. Provide a timeline for the design and development of your Solution.

Our solution for harvesting and analyzing social media and digital content will take two years, with training resources left behind for DHS agencies and affiliate service providers' further use and implementation. To the extent our solution proves effective in listening to, harvesting, and analyzing social media content and general search behaviors, we highly recommend that DHS agencies continue with such solution and our recommendations, and we'd gladly discuss the option of continuing to work with Allegheny County and DHS agencies to further develop and implement such solution beyond the two-year time period discussed below.

Our solution will be divided into three phases:

Phase I: Discovery and Implementation

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Phase I of our solution will be discovery and implementation. Phase I will take three to four months. During this phase, in coordination with DHS agencies and select affiliate service providers, we will do the following:

- Identify the specific DHS agencies and affiliate service providers with which to partner;
- Select the third-party social listening tool;
- Survey DHS agencies and affiliate service providers to identify relevant health and human services programs, topics, and keywords to listen for;
- Identify Pittsburgh and Allegheny County influencers in the health and human services field and discuss implementation strategies with such influencers;
- Develop our qualitative social media hashtag system to receive client and constituent feedback;
- Based on such survey results and discussions with influencers, configure the social listening tool and our Google AdWords, Google Analytics, and Google Search Console keyword mapping strategy to listen for the relevant health and human services programs, topics, and keywords across Allegheny County; and
- Design and develop custom dashboards and quarterly reports.

Phase II: Analyzing and Refining Dashboards and Quarterly Reports

Phase II of our solution will include working with DHS agencies and affiliates to analyze and refine dashboards and quarterly reports. Phase II will begin in month four, and will continue through the end of year two of our engagement. During this phase, we will do the following:

- Review and analyze dashboards and quarterly reports with DHS agencies, affiliate service providers, and key influencers and stakeholders;
- Refine the formatting and style of the dashboards and quarterly reports;
- Review and refine our data collection methodologies, including reconfiguring the social listening tool, as necessary, and refining our keyword mapping strategy, including refining keyword buckets for regional targeting;
- Review and refine our qualitative social media hashtag system;
- Train DHS agencies, affiliate service providers, and key influencers and stakeholders on proper use and configuration of the social listening tool; our qualitative social media hashtag system; and our method for developing and implementing an effective keyword mapping strategy.

Phase III: Trainings and Leave Behind

In the final three months of our engagement, we will prepare leave behind materials for DHS agencies and its affiliates, and we will train DHS agencies and affiliates on such materials. The purpose of such materials will be to ensure that DHS agencies and affiliate service providers are left with a long-term, global strategy for engaging with and listening to the comments, complaints, wants, and needs of the clients and communities of Allegheny County. All leave behind materials will be user-friendly, easy to interpret, and flexible, adaptable, and scalable for the health and human services sector of Allegheny County. Such leave behind materials will include video walkthroughs of our customized solution; the qualitative social media hashtag system; all dashboards and reports; a final analysis of the project,

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

including any surprises, issues we encountered, and our final takeaways; the configured social listening tool; and our recommendations for an ongoing health and human services keyword mapping strategy.

16. Describe your organization's plan to collaborate with DHS during development, implementation, knowledge transfer and training about how to use and maintain the Solution.

From day one, CitizenInsights and Whole Whale will work in close collaboration with DHS agencies, select service providers, and other key stakeholders to develop a comprehensive, effective, and long-lasting strategy for social media listening and broader digital behavior listening.

As discussed above, during Phase I we will work closely with DHS agencies to identify service providers and Allegheny County influencers to select and customize our third-party listening tool; to develop our qualitative social media hashtag system; to identify health and human services programs, topics, and keywords for which to listen; and to develop our keyword digital behavior listening strategy using our keyword mapping approach. At this phase, we'll also work with select DHS agencies and service providers to design and customize the dashboards and quarterly reports, discussed above.

At Phase II, we'll review and analyze our custom dashboards and quarterly reports with DHS agencies and service providers, while training such DHS agencies and service providers on how to use and analyze such dashboards and reports going forward. At this phase, we'll also seek feedback from DHS agencies and health and human service providers about the effectiveness of the dashboards and quarterly reports and our digital listening strategy, adapting and refining such dashboards, reports, and our overall strategy to best understand and harvest the health and human services social media content and search behavior in Allegheny County.

During Phase III, we'll work closely with DHS personnel to develop and refine the leave behind materials discussed above. Proper understanding of such materials, and training on such materials, will be crucial to ensure knowledge transfer and continued implementation and upgrades of the social media and digital listening strategy we've put in place. Further, as indicated above, if our solution proves effective in listening to, harvesting, and analyzing social media content, we'd gladly discuss the option of continuing to work with Allegheny County and DHS agencies to further develop and implement such solution beyond year two of our current commitment.

17. Describe how your organization will evaluate the success of your Solution. Provide an example of how you measured the impact and success of a similar project in the past.

When working with nonprofits, CitizenInsights and Whole Whale look for data solutions to maximize nonprofit impact, while simultaneously measuring our approach, and the data around our approach, and adapting our strategy to maximize our technological impact. As discussed above, once our social listening tool is set up and customized, and our qualitative social media hashtag system and broad social listening strategy is developed, we'll then continuously monitor our social listening strategy, measuring social media activity, testing different configurations, solutions, and keywords, and adapting and refining

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

our strategy to maximize the effectiveness of such strategy. We'll abandon ineffective keywords and hashtags, test new keywords and hashtags, and refine our dashboards and reports based on the needs and preferences of DHS agencies and their affiliate service providers. Our system of continuous evaluation, measurement, adaptation, and refinement will allow us to maximize the success of our solution by the end of year two, and our leave behind materials, discussed above, will allow Allegheny County to maintain and continue to develop an effective social media listening strategy, while avoiding any ideas or innovations that proved ineffective.

Our measured-data approach is the same approach we take with all clients, and proved highly effective when working with Planned Parenthood. Planned Parenthood needed web analytics support for their active website and 90+ affiliates across the country, and we supported and supplemented their web analytics team over the course of two years. While working with Planned Parenthood, we analyzed the relationship between general keyword interest, organic traffic, and local patient activity, pulling together disparate sets of internal and external data to show a strong relationship between patients and their search behavior. Through such process, we were able to track and provide insights regarding the online-offline connection of potential patients, identifying new patient opportunities for Planned Parenthood and its 90+ affiliates.

18. Describe why you want to serve human services clients, your experience in adapting technology to serve human services clients and your plan to adapt your Solution to meet client needs for this category.

CitizenInsights and Whole Whale are mission-driven organizations with a focus on the effective, efficient use of technology to serve health and human services clients. Whole Whale's entire purpose is to leverage data and technology to maximize the social and societal impact of nonprofits, and Whole Whale continuously researches and studies the nonprofit impact chasm between outputs and outcomes, adapting its methods and testing its technological solutions to lessen and ultimately eliminate such impact chasm.

We have a client-centric approach to adapting technologies for social good. Christopher Johnson, the newest member of the Whole Whale team, was the primary contributor building the core platform, infrastructure, and tooling for the Crisis Text Line—a real-time SMS platform that serves as a free, 24/7, nationwide textline for people in crisis. In building the Crisis Text Line, Chris started with the problem—individuals in crisis not having real-time access to intervention—and built and adapted the SMS technology to specifically and substantively address this very real problem. Whole Whale has also developed two nonprofit management tools: allgoodtext.com, an SMS platform that pulls an organization's most important program data from dashboards and texts such information to the organization's leaders on a weekly or monthly basis, and SNORKL, an RFP generator that creates technology RFPs and connects nonprofits with prescreened technology vendors.

As is the case with all of our projects, our solution starts with the client—in this case, the health and human services clients and communities in Allegheny County—and the needs of DHS agencies and

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

service providers—listening to the comments, complaints, messages, and search behaviors of the clients and communities. As discussed throughout Section B, our approach to social media listening and digital behavior listening will start by working with DHS agencies and affiliates to select the best possible social listening tool, discussing client and community social media behavior with the Allegheny County experts, and then customizing the social listening tool to monitor the most important, relevant client and community social media activity. We'll take the same approach in our behavioral listening strategy. Our keyword mapping strategy will again start with the Allegheny County experts, discussing relevant health and human services issues and concerns. We'll then identify keywords, develop buckets of related keywords, and listen for and harvest what clients and community members are searching for or looking to complain about using Google AdWords, Google Analytics, and Google Search Console. We'll then continuously monitor our approach, refining and adapting our approach, as needed, including abandoning any portions of our approach that aren't working, to ensure that our technology solution achieves its stated purpose: listening to and harvesting the social media activity and digital behavior of Allegheny County clients and communities to understand the wants, needs, frustrations, and complaints of such clients and communities.

C. Implementing New or Existing Rating Tools (50 points). If you are proposing a Solution for this category, fill out the questions below. If you are not proposing a Solution for this category, leave this section blank and move to section D. Your response to this section should not exceed 15 pages.

19. Describe your organization's Solution for category C, Implementing New or Existing Rating Tools.

Our Understanding

We understand that DHS is looking for a solution that allows clients to rate and share their experiences with each other. The solution will ensure confidentiality and anonymity of the client, and protect the name and personal information of the DHS employees from public view. The solution will also provide a mechanism for response by the provider. The solution may also track how a provider may respond to client reviews and improve the quality of their services.

Our point of view and approach summary

The CitizenInsights Ratings solution is based on a set of proven client-centered technologies, trust-building program approaches, and community guidelines, which have been successfully used by the GreatNonprofits website to enable ratings and reviews of 10,000+ human services providers. The Ratings solution is designed to collect regular and meaningful quantity of feedback from clients of human services providers.

From our experience, we **do not believe** that simply a website is sufficient for getting a meaningful number of client ratings about human services providers. In more than nine years of operating the GreatNonprofits website, we have observed that a "build it and they will come" approach does not lead

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

to sufficient client engagement. Hard-to-engage clients of DHS or providers often may not have sufficient motivation, time, nor easy access to go online and provide ratings. The CitizenInsights Ratings solution is to solve these technology and programmatic challenges.

Solution Summary:

The CitizenInsights Ratings solution is a client-centered solution designed to overcome the challenges of a public site for ratings by hard-to-engage human services clients. The solution has been developed over the past eight years based on our experience in collecting experience and feedback data from hard-to-engage clients.

The CitizenInsights Ratings Tool has four unique components:

1. Client-Centered Technology. One of the key features of our Technology is SMS to Website Rating capability. This is a key feature for ratings of human services organizations to promote greater client engagement.

- The CitizenInsights SMS (See details from Category A) collects ratings from clients via SMS and stores the client ratings into a secure database. SMS-based feedback makes it easier to reach hard-to-engage clients who may not have Internet access but may have access to a cell phone. Using SMS also allows multichannel promotion of the opportunity to rate a service.
- The ratings collected by CitizenInsights SMS are published on a public, mobile-friendly website. This website enables clients to see quantitative ratings and qualitative reviews submitted for human services providers, search for service providers, and submit their own ratings. Our point of view is that a stand-alone website is insufficient and will not collect a meaningful number of ratings without the additional SMS collection methods.

2. Client-Centered Ratings Program: Getting a meaningful quantity of ratings requires broad and robust participation. CitizenInsights has developed a robust Client-Centered Ratings Program that takes into account the needs, motivations, and concerns of hard-to-engage clients.

3. Community Guidelines and Takedown Process: We have operated the GreatNonprofits website for community-sourced feedback with more than 300,000 feedback ratings and reviews posted. Our operational expertise in community guidelines and publisher liabilities in this legal area, governed by the Digital Millennium Copyright Act, can be leveraged to accelerate the development of community guidelines for this public Ratings solution.

We will work with DHS to adapt best practices for moderating “third-party content,” and adapt tested policies and procedures to protect names and personal information while encouraging clients to freely voice their opinions. We will collaborate with DHS to adapt best practices for community guidelines, developing automatic filters, policies for manual review of “gray area” public postings, investigation of

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

duplicate submissions, and customer service for takedown requests of ratings. Clearly defined public guidelines and internal processes will reduce the risks of maintaining a public website for user ratings.

We will combine our understanding of DHS's needs, our deep knowledge about feedback and engagement of hard-to-reach populations, and our available technology for ratings, process, and people capabilities with similar projects. The result is a comprehensive approach that will effectively support a DHS platform for ratings of DHS or providers.

We can provide an accelerated delivery, knowledge transfer, and training to DHS. We have extensive operational experience in technology, as well as editorial templates, communications templates, and engagement templates for clients to rate human services providers.

After developing detailed requirements, assumptions, and constraints of DHS and providers as to what ratings information can be published publicly, we can develop community guidelines to protect names and personal information while encouraging clients to freely voice their opinions and ideas without concern that their identity will be disclosed.

Some of these policies can be productized into custom features of the Technology. For instance, scrubbing for information not allowed. (Based on our experience dealing with user-submitted reviews of human services providers, there will be "gray area" where it's not clear that the information violates community guidelines. Thus the importance of developing internal processes and procedures to review and approve the content.)

4. Management & Collaboration Process: We have an established project framework consisting of these three phases—Development, Implementation, and Knowledge Transfer & Training. We are experienced in advising, collaborating, and project managing survey projects with a wide variety of human services organizations through the phases of using the SMS client feedback solution. We provide know-how and specialized skill sets across the various technology, communications, data analytics, data visualization, and survey design domains. Our clear, well-governed process ensures that milestones and KPIs are met or exceeded.

High-Level Solution

The CitizenInsights Ratings Platform is a robust web and mobile solution built on nine years of experience in ratings and reviews of human services nonprofits. The design of our software and engagement tools is based on human-centered design principles. The software is optimized for all devices (desktop, tablet, mobile) to maximize accessibility for all clients, and data from SMS can be automatically published to this site. Offline ratings, such as written feedback forms, can be uploaded easily in Excel or CSV to CitizenInsights Ratings website. The solution ensures confidentiality and anonymity of clients. The names or personal information of DHS employees are scrubbed automatically before it goes up.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Benefits for Clients: Easily and conveniently rate service providers, and see other clients' ratings.

- Clients can easily “rate” their experience or “share your experience” via SMS. Clients can also do this via the online website.
- Clients can also post videos and photos online, or via SMS.
- Clients can see aggregate ratings by service provider, break down by specific locations, and categorize by topic.

Benefits for DHS: Get meaningful, regular client ratings of human services providers

- Easily publish and manage the website (no web development experience or skills necessary, cloud-based, domain/hosting included)
- Quickly publish text, images, or video to help explain the human services provider's services, address, phone, and other relevant services information
- Collect, curate, and publish ratings from clients as well as photos and videos
- Upload ratings collected offline
- Customize rating criteria
- Moderate ratings with administration tools
- Activate participants online or offline (immediately after a service interaction, for instance)
- Visually theme the website
- Customize automated filters: Reviews with personal information are automatically flagged and held for manual review
- Analyze ratings (including optional demographic data) with a real-time dashboard and Google Analytics integration
- Provide government- and enterprise-level security and reliability (99.99% uptime)
- Provide consumer grade site performance (two-second or less page loading times)
- Access project data via our API, which uses SSL, RESTful resources, JSON, and UTF-8 encoding (API Documentation)
- Meet ADA, FedRAMP, and W3C requirements

Trust-Building Program: In order to ensure a broad cross section of survey respondents, Citizen Insights will work with DHS and human services providers to create a program to develop and sustain trust with hard-to-engage clients.

- Develop a program to develop trusting communications with hard-to-reach clients
- Personalized messages
- Regular touchpoints
- Multichannel communications: online, SMS, and offline with signage or marketing collateral onsite at human services providers.
- Implementation

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

- Proactively texting clients where DHS has cell phone numbers with a message asking clients to opt-in to rate their experiences
- Designing place-based posters and cards that ask clients to text a short code to a designated number to participate
- Working with DHS agencies to place a field in online forms that enables clients to easily opt-in to provide feedback.

20. Describe your organization's experience with developing, implementing and evaluating Solutions for rating tools for human services. Provide examples of relevant work and include links, images and/or attachments as necessary.

"GreatNonprofits provides the best way to understand the work of nonprofit organizations—through users' eyes" —Bruce Sievers, Stanford University's Haas Center for Public Service

We have extensive experience with developing, implementing, and evaluation solutions for rating tools of human services. We have learned what works and what are the limitations.

We designed, developed, and maintain the website GreatNonprofits.org (www.greatnonprofits.org), which is referred to by many as the "Yelp about Nonprofits." The website was launched in Pittsburgh, Pa., in partnership with the Greater Pittsburgh Nonprofit Partnership and Forbes Funds. Founding nonprofits include North Hills Community Outreach and Human Services Corp. Funders have included the Bill & Melinda Gates Foundation, the Hewlett Foundation, and the Craigslist Foundation.

The site today has more than 5 million individual users per year and 30,000 nonprofits. The website allows users to write stories about their experiences with nonprofits, add photos and videos, and provide star ratings. The site has received national press including the *Wall Street Journal*, *Los Angeles Times*, and *Christian Science Monitor*.

We have implemented technology features that protect the confidentiality and anonymity of users who rate nonprofits. These features also ensure that the names or personal information of employees of nonprofits are not published.

Our in-house designers, engineers, and product managers worked closely with nonprofits to understand their needs and built features accordingly. We have collected more than 320,000 reviews, ratings, and stories about nonprofits.

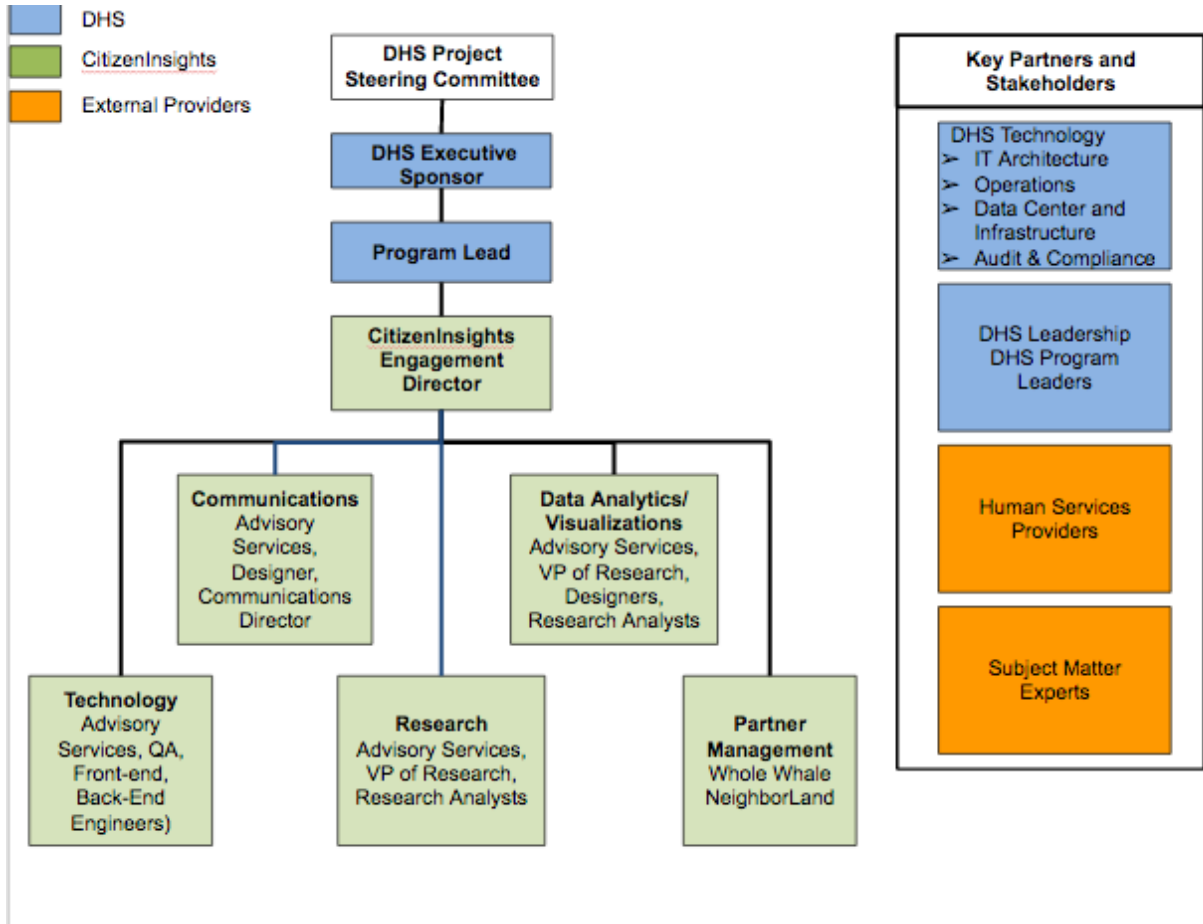
The white label version of the site is used by GuideStar, and the API powers mobile apps and grantmaking intranet sites such as Foundant.

21. Provide staff bios (not CVs) of the key staff who will be implementing your Solution and identify the main point of contact. Describe your management structure and how it will support the goals of your proposed Solution. If you are partnering, describe the structure of the partnership.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

The structure below is the overall program management approach for Citizen Insights' solutions A-E.



CitizenInsights can provide solution C as a stand-alone project or in conjunction with the other solutions we are proposing. The staff listed below are all part of our solution A team. There will be economies of scale if CitizenInsights is selected to work on solutions A & C.

The team for solution C will be run by Nancy Brucker, our Allegheny program director.

Role	Key Responsibilities
CitizenInsights Allegheny Program Director	Provide leadership, oversight, and management of our overall relationship with DHS Organize and lead the project phases, establish accountability, regular check-ins with DHS, activities, milestones, budget, and manage risks based on the established project plan

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

	Work with the DHS leadership team to assess the level of service quality and the degree of satisfaction with CitizenInsights services Review weekly status reports across workstream meetings to review issues and risks that need action
Communications Project/Program Management	Manage program schedule, activities, and deliverables dates related to Communications
Research Project/ Program Management	Manage program schedule, activities, and deliverables dates related to Research methods
Technology Project/Program Management	Manage program schedule, activities, and deliverables related to Technology development, assessment, and evaluation.

Bios:

Perla Ni, CEO and founder of CitizenInsights, 20% FTE Resource

Perla has managed multiyear, multimillion-dollar budgets at Stanford and partnerships with California Endowment and the Heinz Endowments. She has a JD from Harvard Law School, and BA in psychology from UC Berkeley. She is a leading author and speaker on community feedback for social services. She has overseen more than half a dozen research survey initiatives on client feedback using SMS surveys.

Nancy Brucker, CitizenInsights Allegheny Program Director, 30% FTE Resource

Nancy leads all projects in Pittsburgh, assisting clients with program transformation, strategy, survey research, and technology. Nancy has 10 years of experience in health services and evaluation research and three years of experience in technology consulting. She has a master’s of public health from the University of Pittsburgh. She’s previously worked in qualitative and quantitative evaluations at the Center for Health Equity Research, Pittsburgh VA Medical Center, and Highmark Caring Place.

Aimen Barman, VP of Marketing & Communications, 10% FTE

Aimen has more than 30 years of marketing and communications experience at companies such as Ancestry, Audible, PayPal, and YouCaring. She’s passionate about simple, targeted communications strategies.

Jacob Model, VP of Research, 15% FTE

Jacob helped to define the Massachusetts Department of Elementary and Secondary Education’s standards and assessments strategy as part of the \$250 million Race to the Top grant application. He

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

was a research associate at HBS and a consultant at The Bridgespan Group. He is a PhD candidate (expected 2017) in OB at Stanford Graduate School of Business.

Jake Solomon, Head of R&D for CitizenInsights, 10% FTE

Jake has key experience in public policy research, including rigorous survey methodologies, from his time at the RAND Corporation. His work at Code for America also offers important experience in building effective software for low-income populations to access government services.

Chris Johnson, CTO, 10% FTE Resource

Chris was the CTO of Crisis Text Line, built the platform, infrastructure, and original engineering team that powers a national, 24/7 mental health SMS crisis line.

Alex Stefanescu: Lead Engineer, 40% FTE

Alex has extensive experience in online web, mobile, front-end, and back-end technologies. He has been the lead developer for GreatNonprofits website and SMS for the past three years.

Lesley Allison: Head of Customer Service. Lesley has more than 15 years of customer service experience.

22. Provide a detailed budget that clearly supports your Solution and implementation plan. Include a narrative that explains and justifies each budget item and how amounts were calculated. You may provide the budget and budget narrative as an attachment.

SEE ATTACHMENT B for Budget and Narrative

23. Describe your understanding of the challenges inherent in implementing your Solution and how you plan to address those challenges.

Challenges	Solutions/Mitigations
Building trust with clients so they feel comfortable with providing ratings	CitizenInsights Program team has extensive experience reaching out to and building trust with hard-to-engage communities and will pilot and measure the effectiveness of different communications strategies. Extra effort will be put into initial outreach to populate ratings and demonstrate the development of a community.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Low motivation from clients to enter ratings	CitizenInsights' team will emphasize the importance of rating to clients' peers in the community and to the impact ratings can have to improvements in customer experiences.
Potential for inappropriate feedback	CitizenInsights will work with DHS to establish effective monitoring policies and adjust outreach and community guidelines to support effective feedback.
Preventing feedback from specific demographics from dominating ratings	CitizenInsights recognizes the potential for unhappy clients to dominate any rating system. We will monitor the range of ratings received and conduct outreach to better understand and address respondent dynamics with the overall population of potential respondents if we see potentially skewed ratings.

24. Provide a timeline for the design and development of your Solution.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

	Development	Implement	Training & Knowledge Transfer
Length	6-8 weeks	8-16 weeks	16- 20 weeks
Goal	Define and develop needed customizations for rating system	Roll out rating system and refine outreach to ensure robust participation	Transition to DHS Operations
Major Tasks Activities	<p>Program Management: Planning and strategy sessions with DHS</p> <p>Technology: Define requirements with DHS teams, customization of rating system, development of public and internal reporting</p> <p>Program: Develop community guidelines, assess existing contact lists, and develop outreach communications</p>	<p>Program Management: Continued check-ins with DHS project leadership team</p> <p>Technology: Upgrade rating system and reporting as needed.</p> <p>Program: Conduct proactive outreach to DHS clients to develop most effective outreach communications; monitor ratings to ensure robust cross section of participation</p>	<p>Program Management: Continued check-ins with DHS project leadership team with focus on knowledge transfer and training</p> <p>Technology: Document system operations and train appropriate DHS personnel; API guide</p> <p>Program: In-person, webinar, and video trainings to facilitate knowledge transfer to DHS</p>
Participants	CitizenInsights Technology and Program team members; DHS Technology, Data, Program teams	CitizenInsights Technology and Program team members; DHS Technology, Data, Program teams	CitizenInsights Technology and Program team members; DHS Technology, Data, Program teams
Outcomes	<ul style="list-style-type: none"> > Thorough understanding of DHS technology environment > Understanding of DHS programs and policies to inform community guidelines > Internal and external reporting established 	<ul style="list-style-type: none"> > Effective outreach communication to DHS clients developed > Community guidelines tested and in place > SMS surveys deployed > Public website launched > Growing pool of clients providing feedback 	<ul style="list-style-type: none"> > DHS technology team can run system effectively > Outreach activities can be scaled across DHS agencies by DHS personnel

25. Describe your plan to collaborate with DHS during development, implementation, knowledge transfer and training about how to use and maintain the Solution.

We understand that significant collaboration with DHS is required toward the end goal of empowering DHS to run a wide-ranging rating system.

Our approach to collaboration involves engaging DHS teams in the two main domains—Technology and Program—during each of the three phases of the project:

Development Phase: The CI Allegheny program director will organize planning and strategy sessions between our project leadership team and the DHS project team to define the goals, strategy, milestones, and time frames. We will clearly define roles and responsibilities, schedule for regular check-ins, and best processes for communication. CitizenInsights Technology and Program team members will engage with the DHS counterparts. During the phase we will define and execute customizations for

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Technology (especially how the Technology will integrate with DHS systems). We will also work with a DHS-designated team on customizing the rating system, community guidelines, and outreach strategy.

Implementation Phase: Regular check-in sessions between CI leadership team and the DHS project teams to ensure that milestones and deliverables are met. During this phase, we will be implementing the rating solution conducting proactive outreach to DHS clients to encourage ratings, and refining how results are presented to the public and internally. We can make refinements to set goals, strategies, and time frames, as requested by DHS. Teams will again collaborate with their respective counterparts. See Budget Narrative for more detail.

Knowledge Transfer & Training Phase: To ensure that DHS staff are fully equipped to sustain the solution going forward, multiple training formats and channels will be provided. These may include: 1) In-person training; 2) Webinar; 3) On-demand video; and 4) Technical documentation. See Budget Narrative for more detail.

26. Describe how your organization will evaluate the success of your Solution. Provide an example of how you measured the impact and success of a similar project in the past.

The key performance metrics are: 1) client satisfaction with the usefulness of the website; 2) client satisfaction with the ease and convenience of SMS ratings; 3) DHS receiving useful ratings that lead to improved services; and 4) DHS finding the solution easy to use and helpful in understanding the client experience.

27. Describe why you want to serve human services clients, your experience in adapting technology to serve human services clients and your plan to adapt your Solution to meet client needs for this category.

We want to serve human services clients because it is part of our nonprofit mission. Since our inception, we have built technologies and programs to serve the needs of human services clients and the organizations that serve them. We were founded in Pittsburgh, Pa., with funding from the Forbes Funds. Our founding partners were human services organizations such as North Hills Community Outreach and Human Services Corp. in Allegheny County. We have been adapting technology for nonprofits for more than nine years. Our plan is to customize and extend our technologies, expertise, and client-centered program to meet the needs of hard-to-engage clients served by DHS and human services providers.

D. Engaging Individuals and Communities in Public Planning Processes (50 points). If you are proposing a Solution for this category, fill out the questions below. If you are not proposing a Solution for this category, leave this section blank and move to section E. Your response to this section should not exceed 15 pages.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

28. Describe your organization's Solution for category D, Engaging Communities in Public Planning Processes.

Introduction:

CitizenInsights has partnered with Neighborland, a company with extensive experience working with cities to create collaborative engagement in public planning processes. Their technology, track-record, and reputation for service are some of the many reasons why we trust them to provide a Solution for this category.

Neighborland Solution:

Neighborland is a communications platform that enables city agencies to collaborate with residents in an accessible, participatory, and equitable way. The design of our software and engagement tools is based on advocacy planning theory and human-centered design principles. Our approach helps our partners collect broad-based, inclusive, and representative feedback from the public. Note that our software is optimized for all devices (desktop, tablet, mobile) to maximize accessibility for all residents, and data from public workshops and SMS can be uploaded easily to Neighborland for residents who are not as familiar with sharing feedback online.

The Neighborland platform will enable DHS and their facilitators to:

- Easily publish and manage project websites (no web development experience or skills necessary, cloud-based, domain/hosting included)
- Quickly publish text, images, video, documents, and events to project pages to help explain project goals, time frame, and outcomes to stakeholders
- Collect, curate, and publish stakeholder feedback (ideas, votes, comments) on any web-enabled device
- Upload stakeholder feedback from workshops and events in public space
- Publish single- and multiple-choice surveys, and collect stakeholder input
- Map resident ideas, insights, and solutions to specific locations and categorize by topic
- Moderate stakeholder engagement with project administration tools
- Activate participants at key inflection points of projects with email notifications
- Visually theme pages with each project's visual identity
- Collect insights with SMS and/or Twitter
- Analyze project and participant data (including optional demographic data) with a real-time project dashboard and Google Analytics integration
- Provide government- and enterprise-level security and reliability (99.99% uptime)
- Provide consumer grade site performance (2 second or less page loading times)
- Enable residents to easily share feedback on social media (Facebook, Twitter, Google)

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

- Access project data via our API, which uses SSL, RESTful resources, JSON, and UTF-8 encoding ([API Documentation](#))
- Meet ADA, FedRAMP, and W3C requirements

As with any technology platform choice, our partners' choice of platform comes down to features, pricing, and performance (outcomes). First, we have the most feature-rich and configurable engagement platform for planners' key tasks: surveying, mapping, ideating, upvoting, prioritization, sharing resources, curating, messaging, and facilitating. And because we've built a platform (as opposed to building a set of templates on a third party like Drupal, Wordpress, or Squarespace), our partners avoid costly design, engineering, and maintenance fees, as they are built into our monthly services agreement. More importantly, we are the only engagement platform on the market that connects real-world (handwritten), voice, SMS, Twitter, and web-based participation in one place. That's why we were chosen to be a platform partner in the 100 Resilient Cities program, pioneered by Rockefeller Foundation.

Our strategic technology decisions are made in alignment with our vision of providing an open web platform for residents to improve the communities where they live. Neighborland is built on open source technology. We use Ubuntu servers, PostgreSQL and Redis databases, the Apache HTTP server, ruby, rails, javascript, and a long list of higher-level libraries. We contribute back to many of these projects, including leadership roles in the Haml and RGeo organizations. We have open sourced many of our own libraries under the MIT license (unrestricted free use). You can find our open source work on GitHub: <https://github.com/neighborland>. A key component of our system is Amazon Web Services, which hosts our infrastructure and provides us with an unlimited scalable web platform. We use Amazon's servers (EC2), load balancer, VPN, email service (SES), file storage (S3), and the CloudFront CDN. The Neighborland platform code represents much of our core business value, which lies in providing a single, secure, hosted software platform. Our engineering team constantly tunes the system to ensure great performance on all modern browsers and devices. We serve all pages securely over SSL, backup all data offsite, salt passwords, monitor uptime, and harden the system against malicious attacks.

Our unified platform is a major differentiator. We have had over 1,000,000 neighbors participate in civic engagement projects on Neighborland. This highly engaged network of residents gives facilitators in many US cities a distribution network for their projects from day one. And if we're launching in a new market, we have a distribution playbook for engaging with residents effectively both in the real world and online.

Finally, our internal analytics tools are the best on the market. We measure every interaction on Neighborland and display it on an internal dashboard. Because Neighborland is a public space, residents are not required to sign up/in to view content, and can choose to participate anonymously on a per

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

project basis. We leverage Google Analytics' best in class measurement, demographics, and visualization tools. We can also export all activity on Neighborland into our partners' Google Analytics account, for a unified look at all of the data collected on a project. The CitizenInsights project team and DHS can access project data via the Neighborland API at any time. The technical documentation for our JSON API can be viewed here: <https://neighborland.com/docs>. Finally, it's worth noting that we have passed all ADA, FedRAMP, WC3 compliance testing with our partners in the government and university sectors. All of our web traffic is transmitted securely over SSL. We do not store any protected health information. If DHS or its partners creates a survey with that type of data, it will be private and encrypted in-transit via SSL. If you have any questions about legal compliance, we're happy to share our full legal briefing.

The bottom line? Our partners and stakeholders have generated more than \$500 million in economic and social impact as a direct result of their projects on Neighborland. We're proud to have helped them make it happen.

29. Describe your organization's experience with developing, implementing and evaluating Solutions to engage individuals and communities in public planning processes. Provide examples of relevant work and include links, images and/or attachments as necessary.

As a social enterprise, Neighborland has worked with more than 200 civic organizations in the U.S. over the past five years, including city agencies, universities, foundations, and local nonprofits. We work primarily with city agencies, and have supported projects with the city governments of San Francisco, Oakland, San Jose, Los Angeles, Houston, and Atlanta among others. We've attached three case studies that best illustrate our capabilities.

In addition, here's a selection of recent projects with city agencies:

City of SF Department of Homelessness and Supportive Housing - [Project Homeless Connect](#)

City of SF Administrator - [Central Market Community Benefit Agreements](#)

City of SF Administrator - [Resilient San Francisco Strategic Plan](#)

City of SF Administrator - [Resilient Miraloma Park](#)

SF Planning - [Central Waterfront and Dogpatch Public Realm Plan](#)

SF Planning - [Lower Haight Public Realm Plan](#)

SF Planning - [Market Street Prototyping Festival](#)

City of SF OEWD - [Pause, Play, Connect \(UN Plaza\)](#)

City of Oakland Mayor's Office - [Our City Public Design Fair](#)

City of San Jose Planning - [Tactical Urbanism Demonstration Projects](#)

City of Los Angeles Office of Resilience - [Resilient Los Angeles Strategic Plan](#)

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

City of Atlanta Planning - [Turner Field Stadium Redevelopment Study](#)

County of Miami-Dade - [Mobility Survey](#)

City of Houston Planning - [Washington Avenue Corridor Study](#)

City of Mountain View (CA) City Council - [Public Square](#)

City of West Hollywood Planning - [Eastside Community Plan](#)

City of Portland (ME) Planning - [Congress Square Public Life Study](#)

City of Lowell (MA) Office of Economic Development - [Economic Development Survey](#)

City of Akron (OH) - [Innerbelt 500 Plates Demonstration Project](#)

SFMTA - [Safer 6th Street Demonstration Project](#)

Atlanta Regional Commission - [Living Beyond Expectations Demonstration Project](#)

Greenbelt Alliance, Google.org, Health Trust, Knight Foundation – [Public Square](#)

30. Provide staff bios (not CVs) of the key staff who will be implementing your Solution and identify the main point of contact. Describe your management structure and how it will support the goals of your proposed Solution. If you are partnering, describe the structure of the partnership.

CitizenInsights is pleased to partner with Neighborland to propose this solution. We believe that Neighborland's established product is an excellent fit for community engagement in planning projects. CitizenInsights will enhance the effectiveness of their implementation through coordination with the agencies we are working with, and by adding the knowledge we have gained through our work on other solutions.

CitizenInsights will play a coordinating role in this solution as part of our overall project management. Once training is completed, the Neighborland solution can be effectively run by DHS employees, and CitizenInsights Engagement Manager will serve as the overall project manager and management contact.

Dan Parham

Project Director (main point of contact)

Contact: (917) 501-9506, dan@neighborland.com

Our CEO Dan Parham leads all partnerships for the company. Dan has personally directed all 200+ projects on the Neighborland platform to date. Dan has 17 years experience in designing and building effective communications software. Before founding Neighborland, Dan was a director of user experience at Yahoo, working for the Marketplaces and Advertising Platform teams. As a director of UX, Dan led product design and research for the Marketplaces division, and directed the integration of the Right Media Exchange (\$650 million acquisition) into Yahoo's core advertising platform. **Previously, Dan** was associate creative director for Time Warner. In 2007, Dan led a small, internal team of designers and

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

developers on AOL's platform redesign, which was used by more than 250 million people. Dan has a BFA from the University of North Carolina.

Tee Parham

Software Engineering Lead

Contact: (303) 641-6641, tee@neighborland.com

Tee Parham, our CTO and principal engineer, has 20 years experience in software engineering, software product design, data modeling, process automation, data integration, spatial information, and interaction design. Tee has developed software for companies such as the YMCA, the American Cancer Society, Sagent (now Pitney Bowes), Miner and Miner, Pharmaca, Equifax, Bright Funds, and Entiera (now FICO). Tee holds a master's of computer science from the University of Tennessee.

Candy Chang

Civic Engagement and Public Art Lead

Contact: candy@neighborland.com

Candy Chang is a world-renowned urban designer and planner. She received the TED Prize in 2012 and is a World Economic Forum Young Global Leader. Over the past decade, she has led community engagement projects with the United Nations, the World Bank, and the Rockefeller Foundation. Candy holds a master's in urban planning from Columbia University, and Neighborland is based on her research.

31. Provide a detailed budget that clearly supports your Solution and implementation plan. Include a narrative that explains and justifies each budget item and how amounts were calculated. You may provide the budget and budget narrative as an attachment.

As a SaaS platform, our pricing has three dimensions: a one-time project setup fee, monthly license (service tier x length of project), monthly customer support fee (optional). Our pricing model is described in detail [here](#).

Here's an estimated budget based on a few assumptions: two projects/year for two years, Neighborland providing project setup (optional service), Minimal customer service needed.

1. Tier of service

DHS will license our Basic tier of service for two projects/year for two years.

2 projects/year = 24 months x \$1,000/month = \$24,000 / year x 2 years = \$48,000

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

2. Project Setup (optional)

Our account management team will work closely with DHS to set up the HACLA project site. Our Basic service setup fee is \$2,500/project and includes the following services:

- We consult with DHS's team on the program model strategy, workshop/event schedule, and project(s) design. We provide up to 12 hours of program model consultation and project management (via email, phone, video screenshare).
- Additional setup including content design, graphic design, copywriting, and data uploading is billed at \$150/hr.
- We will set up the full project website within two business days of an approved project content template.

Four project setups = \$10,000

3. Customer support (optional)

Through the course of the project, the DHS project team may need help with their distribution strategy, moderation strategy, designing/planning/executing community workshops, or updating the project site content and design as the project progresses. Our basic tier of customer support is \$500/month and includes up to 5 hours per month of support per month. We can also bill this hourly at \$150/hour if preferred.

Two years customer service (Five hours/month) = \$12,000

4. DHS Training (optional)

Our account management team will train the DHS outreach team on how to use the Neighborland platform effectively for this program model. We can conduct this workshop virtually for \$2,500, or for \$5,000 in person (expenses included).

Training workshop = \$2,500 (remote) or \$5,000 (in person). For our total budget calculation, we will assume \$2,500.

5. Project archive

Project archive fee = \$1,500/year per project = \$6,000

We will export a report of all activity on your project and archive your projects for a small annual fee. For any six+-month project, we will post a simple update page and host the project for free so that other organizations can learn from the project.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

6. Additional services

Additional services include: program model strategy, project management, workshop design/planning/facilitation, on-platform project moderation, product design/engineering of custom features, and data analysis/reporting. These services are billed hourly and range from \$150 to \$200/hour depending on the service.

32. Describe your understanding of the challenges inherent in implementing your Solution and how you plan to address those challenges.

Projects need to be easy to understand, and easy to use for residents. Residents are often confused by highly technical and wonky policy and planning terminology. We are experts in communicating with residents in a language they can understand, and offer our setup service to leverage best practices from more than 200 successful projects across the U.S.

You may need help updating content, importing ideas from new events or boards, moderating community-generated content, and updating the site content and design as the project progresses. We offer program model consulting, project management, custom design and engineering, and on-demand customer support. We can transcribe, de-duplicate, cluster, and edit handwritten input as an additional service. We can include an estimate of this work up front based on the number of community workshops and events you plan on doing.

Successful projects on Neighborland have an active community manager who spends at least one to two hours per week cultivating the project. We offer community management as a service, or we can provide a one- to two-hour training on our software's full capabilities for our partners as an additional service. It's important to restate that our platform is a self-service technology that requires no software engineering ability to setup or use for most projects, and our partners who have a community manager on their teams require no additional support from us.

33. Provide a timeline for the design and development of your Solution.

Our platform is a "turnkey" solution that requires no software engineering ability to set up or use. Once our partner completes a [project content template](#), we can have a project site live in 48 hours. If a project requires copywriting, graphic design production, information architecture, or data transcription from our team, we can estimate the timeline of this additional scope of work. The maximum amount of time we've allocated for this type of work is five business days. Once a project is live, project administrators have access to our editing, messaging, moderation, and analytics tools at any time.

34. Describe your organization's plan to collaborate with DHS during development, implementation, knowledge transfer and training about how to use and maintain the Solution.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Our approach to engaging the public includes four steps:

1. Project Kickoff

We will organize a planning and strategy kickoff between our project leadership team and the DHS project team to define the goals, strategy, and time frame of each project website. We will clearly define roles and responsibilities during this kickoff meeting, and establish a timeline for project delivery.

2. Platform Training (optional)

We provide a two-hour remote video training at the outset of a project at our partner's request. We offer monthly customer support (pricing detailed [here](#)) if desired by our partners.

3. Community Workshop Support (optional)

We can provide strategic consulting to DHS's facilitation team in the design, planning, and facilitation of public workshops.

4. Project Setup

To achieve broad-based, inclusive, and representative stakeholder engagement, your project site needs to be easy to understand, and easy to use for residents. Residents are often confused by highly technical and wonky urban planning and design terminology. We are experts in communicating with residents in a language they can understand, and offer our setup service to leverage best practices from more than 200 successful projects across the U.S. There are two tiers of setup support described in detail [here](#).

5. Online Engagement

Once your project site is live, you will have two responsibilities to ensure the success of your project. First, someone on our team will need to "tend the garden" of your project (this service can be provided by Neighborland staff). We provide all of the tools needed for on-platform facilitation, including moderation, editing, clustering, and curating residents' insights. Second, you will need to market your project using your established channels (email lists, social media, etc.). Note that the focus of your project will most likely evolve over time as you move from collecting opportunities to prioritization and decision-making. You can evolve the design of your project over the course of your project to reflect the evolution of your program model. We also offer project status flags (progress, financed, under construction, made it happen) to communicate project delivery to your network.

6. Distribution

We will need to market our project(s) using your established channels (email lists, social media, etc.). Once residents sign up to your project, our tools will allow you to publicly or privately message your network during key inflection points of your project. We also offer a best practices guide for reaching residents online and in the real world.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

7. Reporting

We provide a real-time dashboard of all stakeholder activity on each project. We export this data into a real-time Google Analytics dashboard that our partners can access at any time (optional). We also provide an export of participant data to partners at the end of the project in a format of their preference (xls, csv, raw). We provide data analysis and reporting as an additional service (billed hourly).

35. Describe how your organization will evaluate the success of your Solution. Provide an example of how you measured the impact and success of a similar project in the past.

From an evaluation standpoint, our partners define their success metric depending on the goals of their outreach. Common metrics for online engagement include: number of participants, time spent, on-platform actions (votes, comments, actions). These metrics are important for ensuring a successful project, but we always encourage our partners to focus on the outcomes of their engagement. That's what matters to their stakeholders. For example, if we collect data from 100x the number of participants normally engaged, but there's no impact to DHS's delivery of services, we wouldn't consider this project a "success."

Internally, we've created a metric we call "return on engagement" to help our partners measure the impact of their public outreach. The math is fairly simple. Total the staff time, volunteer hours, and hard costs of a public engagement process and divide it by your project's key metric (ex. total number of participants, surveys answered from a particular demographic, time saved).

For example, in our work with the City of San Francisco Planning Department on the 2015 Market Street Prototyping Festival, the total project budget was close to \$250,000 and we had more than 250,000 residents participate in the project (cost of the engagement was \$1/resident). The return on investment was measured by the total value of earned media and in-kind donations from local private partners (ex. Verizon, Autodesk, Cushman & Wakefield) for the subsequent festival in 2016. It's important to note that data collected from this project helped inform the \$450 million in capital improvements planned for Market Street in 2017 and was seen as an important and cost-effective source of ethnographic data for the design team.

In the spring of 2016, we partnered with the City of Atlanta Department of Planning and Community Development, Atlanta Regional Commission, Invest Atlanta, and the Annie E. Casey Foundation on a \$212,000 Livable Cities Initiative grant. The purpose of the grant was to fund an economic analysis and public visioning exercise for the redevelopment of the 67-acre Turner Field site in downtown Atlanta. Given the scale and history of the site, and its potential to catalyze the surrounding neighborhood's redevelopment, the city's engagement strategy was to collaborate closely with residents to make recommendations on land use, housing, zoning, and economic development for the site. A project of this scale required the most accessible process possible. The planning team, led by Perkins+Will, focused their engagement strategy on collecting a broad-based, diverse, and representative vision from the

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

public. Insights were collected through innovative in-person workshops and extended online with Neighborland. The budget for the online project site was \$20,000 and we helped the team engage more than 4,000 residents online (\$5/resident) in the process.

Launched in 2012 by Greenbelt Alliance, Public Square was an innovative civic engagement program that gave the people of the city of Mountain View, Calif., a new way to actively shape the future of their community. Greenbelt Alliance's program model focused on engaging residents in an open and transparent dialogue, both in public space and online. The program connected more than 5,000 neighbors and community leaders with the City Council of Mountain View. Their insights helped inform the city's strategic plans, including the El Camino Real Precise Plan and the North Santa Clara County Bike Vision Plan, both of which will enhance the quality of life for residents for years to come. Public Square was financially supported by a coalition of values-aligned organizations including Silicon Valley Community Foundation, Knight Foundation, Health Trust, and Google. The total cost of the program was \$150,000 (\$30/resident), and a key outcome was the first comprehensive bike plan ever drafted for Silicon Valley, supported by Google.

36. Describe why you want to serve human services clients, your experience in adapting technology to serve human services clients and your plan to adapt your Solution to meet client needs for this category.

Neighborland is built for government agencies who want to engage with residents. Over the past five years, we have partnered with a wide range of city agencies in cities across the U.S. from human services to urban planning, housing, transportation, workforce development, and resilience. All of these agencies have chosen a community-centered approach to their public outreach and engagement because it's a more effective approach. Let's face it, most people do not enjoy traditional feedback and engagement forums, and fewer have the time to participate in these forums given their everyday challenges. DHS and your clients would be ideal partners for us.

Our platform is designed for city agencies to facilitate accessible, inclusive, and equitable public engagement. Accessibility is the core strength of our platform. All projects start by listening to residents and amplifying their voices. We are the only platform that allows facilitators to collect insights from handwritten data at public workshops and events, SMS and Twitter input, voice (phone), and online into one database. We have focused on building a mobile-first platform that works on any modern web browser on any device. Often, our partner's best justification for choosing Neighborland is simply having decision makers use the products they are considering themselves, or even better, observing their customers using the different tools. In addition, our partners can simply compare the engagement on our projects with other platforms. The data speaks for itself, and it's why our partners are eager to share the outcomes of their work publicly on our Handbook.

Why does Neighborland work? We have listened to our 200 partners and 1,000,000 participants over the past five years, and have integrated their feedback directly into the platform. For example, Neighborland is not an agnostic platform (Twitter, Reddit, etc.). We must provide a safe, public space for

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

residents. Only verified city agencies, and their trusted partners (ex. contracted service provider) have administrative privileges to facilitate and moderate projects on our platform. Neighborland is free for residents to use, and they can choose to participate with their real identity or anonymously. We provide city agencies with lightweight surveys to collect optional demographic information, and can run third-party verification reports if needed. Our purpose is to make collaborating with residents easier for city agencies, and so our administrative and analytics tools must be as easy to use as best-in-class, consumer-grade software. Again, the product speaks for itself in this regard.

Finally, Neighborland is an extensible, scalable solution for our partners. All of our partners tend to try Neighborland on a smaller project and then scale up once they've developed confidence internally in a community-centered approach. For example, in the city of San Francisco we started with several pilot projects, and then scaled our work up to the neighborhood and now city scale. Over the past three years, we have worked with seven city agencies, including the City Administrator, Office of Resilience and Recovery, Planning Department, Office of Economic and Workforce Development, Department of Public Works, and Department of Homelessness and Supportive Housing.

E. Other Innovative and Creative Solutions (50 points). If you are proposing a Solution for this category, fill out the questions below. If you are not proposing a Solution for this category, leave this section blank. Your response to this section should not exceed 15 pages.

37. Describe your organization's Solution for category E, Other Innovative and Creative Solutions, and the issue it proposes to solve.

Introduction: Qualitative Audiovisual Client Journeys Maps

The solution described here is designed as an add-on to our proposal for solution A—CitizenInsights SMS. We believe that the survey work proposed in Section A will greatly help DHS understand the client experience from a quantitative perspective. Quantitative and representative data from SMS is critical to guide DHS program improvement efforts and establish a foundation for effective client engagement.

We also believe that qualitative data from deeper observations of user experience can deliver exciting insights that can enhance quantitative findings. To supplement Solution A's quantitative approach, we propose a pilot solution to capture more qualitative information from clients. This solution will focus on getting a deeper, more holistic, more personal perspective from a small number of clients.

Client Journey Solution

We propose developing audiovisual journey maps for a small number of clients as part of our partnership. We will accomplish this by augmenting our survey platform to accept a time series of audio

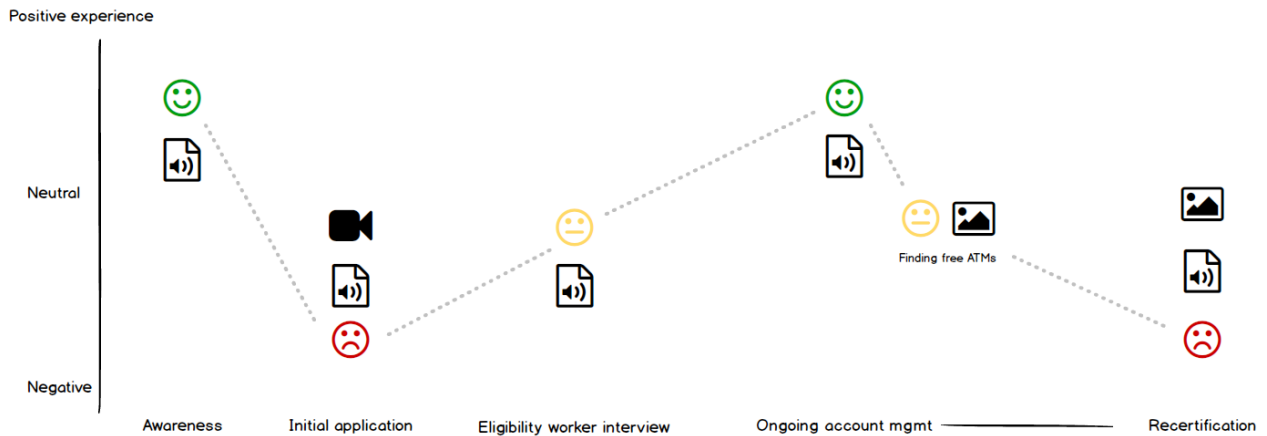
RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

messages and photos from individual clients. The goal is to supplement the quantitative work and gain a deeper understanding of the ground-level client experience.

Although we will determine the program focus in partnerships with DHS, we provide here possible examples to illustrate the potential. By collecting time series audio messages and photos, we could construct a 30-day photo-timeline of an individual with unstable housing as they navigate the shelter system, find legal places to park overnight, live in a Section 8 SRO, etc. This ground-level view would enhance DHS’s perspective on the lived experience of homelessness and likely unearth new opportunities to improve DHS programs. Another possible example is finding an individual client who is enrolling for the first time in a job training program and ask them leave a short audio message after each interaction with the agency. This would give DHS a better understanding of how the program unfolds over time and where clients may be particularly frustrated or empowered by the program.

In these cases and others, CitizenInsights staff will receive the audiovisual files and store them on HIPAA- compliant databases. Then CitizenInsights staff will edit the content as necessary for substance and confidentiality. CitizenInsights will then collate this data into audiovisual client journey maps to capture their personal experience and share with DHS. No data from this solution would be shared publicly. Again, while these examples are promising possibilities, we will decide the program and client focus in partnership with DHS depending on priority areas and data collected in year one of our partnership.



The goal is to supplement the quantitative work and gain a deeper understanding of the ground-level client experience. This qualitative information often yields more actionable insights (e.g., there is graffiti in the client bathrooms) and can inspire DHS in their work by enhancing client empathy. Although we believe this approach has great potential, we also recognize that this is a more creative, less proven technique and therefore recommend a smaller scale and lower budget pilot approach after we establish the efficacy of the survey work.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

38. Describe your organization's experience with developing, implementing and evaluating projects similar to your proposed Solution. Provide examples of relevant work and include links, images and/or attachments as necessary.

In the past nine years, GreatNonprofits has evaluated, developed, and implemented both qualitative and quantitative client-feedback solutions. On the qualitative side, GreatNonprofits has enabled users to tell stories about their experiences using rich media such as photos and videos. In this current year, GreatNonprofits' platform is enabling 200K views of video-based stories.

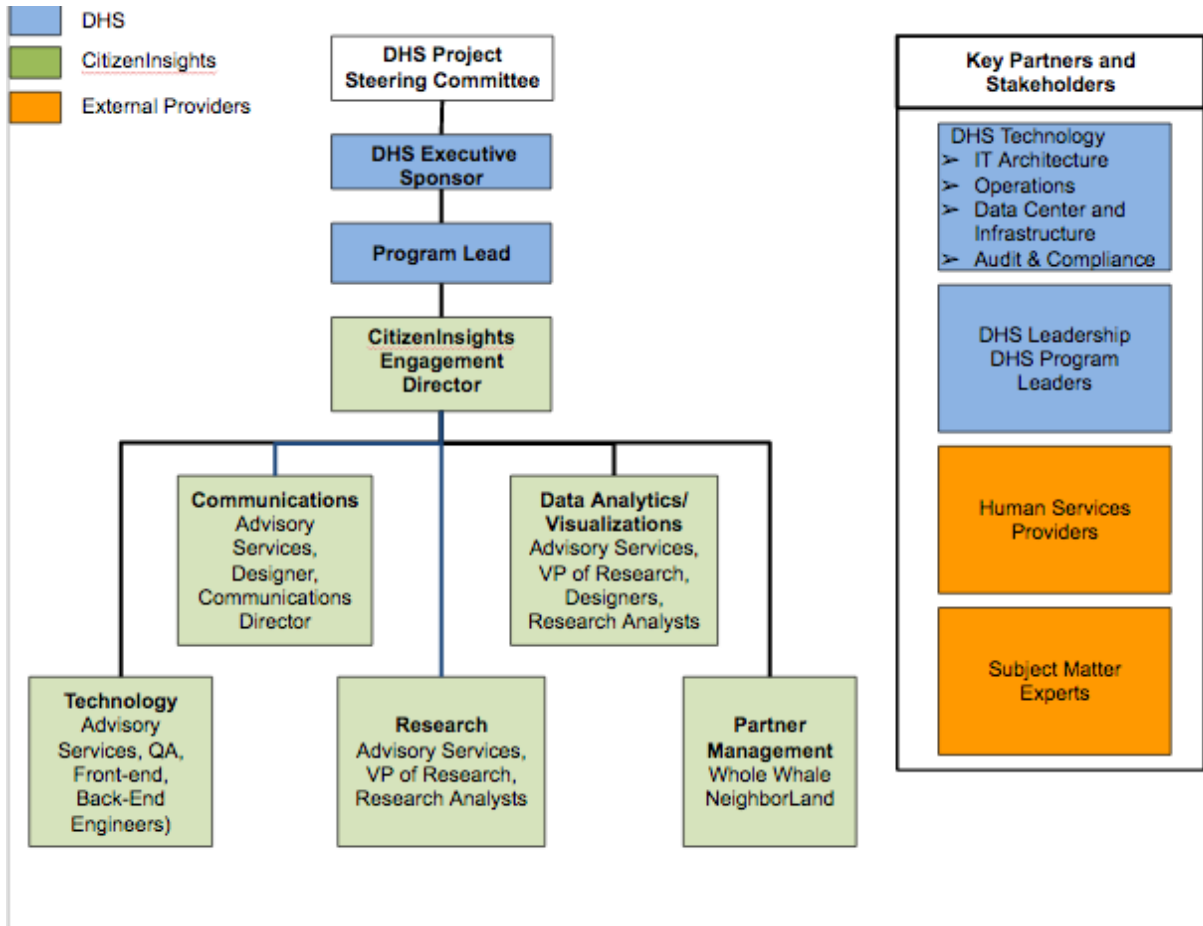
The team has specific experience evaluating the client experience of both Medicaid and SNAP. In these evaluations the team applied technology in creative ways to build a holistic understanding of the client experience, including using screen capture software to understand the online enrollment process, creating web-based flowcharts to document the structure of all client-facing phone trees, and engaging clients via text message for qualitative feedback.

39. Provide staff bios (not CVs) of the key staff who will be implementing your Solution and identify the main point of contact. Describe your management structure and how it will support the goals of your proposed Solution. If you are partnering, describe the structure of the partnership.

As a potential extension to Solution A, the same team will run this sub-project. The following represents Citizen Insights the overall management structure.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement



Role	Key Responsibilities
CitizenInsights Allegheny Program Director	Provide leadership, oversight, and management of our overall relationship with DHS Organize and lead the project phases, establish accountability, regular check-ins with DHS, activities, milestones, budget, and manage risks based on the established project plan Work with the DHS leadership team to assess the level of service quality and the degree of satisfaction with CitizenInsights services Review weekly status reports across workstream meetings to review issues and risks that need action
Communications Project/Program Management	Manage program schedule, activities, and deliverables dates related to Communications
Research Project/ Program Management	Manage program schedule, activities, and deliverables dates related to Research methods

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Technology Project/Program Management	Manage program schedule, activities, and deliverables related to Technology development, assessment, and evaluation.
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Relevant Bios of Key Team Members and Time Available

Perla Ni, CEO and Founder of CitizenInsights, 50% FTE

Perla has managed multiyear, multimillion-dollar budgets at Stanford and partnerships with California Endowment and the Heinz Endowments. She has a JD from Harvard Law School, and BA in psychology from UC Berkeley. She is a leading author and speaker on community feedback for social services. She has overseen more than half a dozen research survey initiatives on client feedback using SMS surveys.

Nancy Brucker, CitizenInsights Allegheny Program Director, 100% FTE

Nancy leads all projects in Pittsburgh, assisting clients with program transformation, strategy, survey research, and technology. Nancy has 10 years of experience in health services and evaluation research and three years of experience in technology consulting. She has a master's of public health from the University of Pittsburgh. She's previously worked in qualitative and quantitative evaluations at the Center for Health Equity Research, Pittsburgh VA Medical Center, and Highmark Caring Place.

Aimen Barma, VP of Marketing & Partnerships, 30% FTE

Aimen has more than 30 years of marketing and partnerships experience at companies such as Ancestry, Audible, PayPal, and YouCaring.

Jacob Model, VP of Research, 40% FTE

Jacob helped to define the Massachusetts Department of Elementary and Secondary Education's standards and assessments strategy as part of the \$250 million Race to the Top grant application. He was a research associate at HBS and a consultant at The Bridgespan Group. He is a PhD candidate (expected 2017) in OB at Stanford Graduate School of Business

Jake Solomon, Head of R&D for CitizenInsights, 20% FTE

Jake has key experience in public policy research, including rigorous survey methodologies, from his time at the RAND Corporation. His work at Code for America also offers important experience in building effective software for low-income populations to access government services.

Alana Conner, PhD, Communications Expert, 20% FTE

Alana is cultural scientist who studies, writes about, and consults on culture, psychology, and health. She has a PhD in social psychology from Stanford and was a postdoc fellow at UCSF, where she focused her research on social class differences in decision making and health.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Chris Johnson, CTO, 20% FTE

Chris was the CTO of Crisis Text Line, built the platform, infrastructure, and original engineering team that powers a national, 24/7 mental health SMS crisis line.

40. Provide a detailed budget that clearly supports your Solution and implementation plan. Include a narrative that explains and justifies each budget item and how amounts were calculated. You may provide the budget and budget narrative as an attachment.

Two-Year Budget

(detailed narrative below)

Phases	Budget Narrative	Costs	Details
Development	See below	\$5,000	50 hours (\$100/hr)
Implementation	See below	\$25,000	250 hours (\$100/hr)
Knowledge Transfer & Training	See below	\$5,000	50 hours (\$100/hr)
	Total Costs	\$35,000	

Detailed Narrative

Development

Development includes meeting between CitizenInsights and DHS to decide the exact program, agency, and client focus(es) for the 5 journey maps. The focus areas will likely depend on DHS priorities and our findings from data collected in year one of our partnership. Because Solution E is a smaller component of work than other sections, we anticipate minimal additional development work. Where possible we will synchronize the ongoing meetings from Solution A and this development work.

Implementation

Implementation includes everything required to recruit clients, gather audiovisual data, and create the journey maps. Specific work includes:

- Configuring the CitizenInsights SMS survey platform to receive audio and photo files
- Recruiting clients in-person to participate in the journey mapping
- Manually reviewing the data for substance and confidentiality
- Collating the data into audiovisual journey maps

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Knowledge Transfer & Training

Knowledge Transfer & Training includes everything required to empower DHS to create additional audiovisual journey maps in the future across other programs and agencies. This will include in-person training for DHS staff and written training materials. Topics will include CitizenInsights configuration requirements, documentation of client recruiting and consent processes, and instructions on how to collate the data into audiovisual journey maps. As with the development phase, we will synchronize this work with ongoing meetings from Solution A where possible.

41. Describe your understanding of the challenges inherent in implementing your Solution and how you plan to address those challenges.

For audiovisual client journeys maps, because this is a more involved approach, we would offer a larger incentive to compensate for their time and recruit individuals in-person in order to review a thorough consent and education process.

This is a time-intensive solution since it requires working with individual clients, manually reviewing incoming data, and semi-manually generating journey maps based on this data. However, we believe that even a small number of qualitative audiovisual journey maps are incredibly valuable, and DHS would only need to collect 5 maps in order to evaluate the usefulness of this approach.

42. Provide a timeline for the design and development of your Solution.

Although we could start this work anytime, it is CitizenInsights recommendation that we do not start until Year Two of Solution A. At that point, our survey work will be in full execution and DHS and CitizenInsights will be able to choose agencies for this work that have to greatest potential for program improvement.

The expected timeline once this project starts is

- two months to decide/change platform and select agencies
- two months of outreach and data collection
- two months of analysis and presentation of results

43. Describe your organization's plan to collaborate with DHS during development, implementation, knowledge transfer and training about how to use and maintain the Solution.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

We understand that significant collaboration with DHS is required toward the end goal of a successful project. In collaboration with DHS, we will put in place governance processes and mechanisms in order for the project to achieve the expected outcomes.

Since we view this solution as an extension of our Solution A, collaboration will flow from the team structure and meetings that ensure effective collaboration for the overall project. Our Allegheny Program Director or another member of the project team will be designated as the point person for this project.

Please see our answer to question 7 for more on our overall framework for collaboration.

44. Describe how your organization will evaluate the success of your Solution. Provide an example of how you measured the impact and success of a similar project in the past.

For this pilot audiovisual client journeys maps, we do not propose a formal quantitative evaluation. While the goal is to gain a deeper understanding of the ground-level client experience and support DHS program improvement efforts, the success of this solution is best evaluated by direct input from DHS leadership.

Instead, we recommend some qualitative questions to pose to DHS leadership after they see/hear the client journeys:

- How has hearing/watching this client journey map changed the way that you relate to this client?
- What surprised you hearing/watching this?
- If you were this client, what would be a change, maybe even a small change, that you would appreciate?
- Do you have any ideas for changes to your program based on what you saw/heard?

Again, while we believe this approach has great potential, we also recognize that this is a more creative technique that is not anchored to predefined and measurable outcomes and therefore recommend a pilot approach.

45. Describe why you want to serve human services clients, your experience in adapting technology to serve human services clients and your plan to adapt your Solution to meet client needs for this category.

We want to serve human services clients because it is part of our nonprofit mission. Since our inception, we have built technologies and programs to serve the needs of human services clients and the organizations that serve them. We were founded in Pittsburgh, Pa., with funding from the Forbes Funds. Our founding partners were human services organizations such as North Hills Community Outreach and

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

Human Services Corp. in Allegheny County. We have been adapting technology for nonprofits for more than nine years. Our plan is to customize and extend our technologies, expertise, and client-centered program to meet the needs of hard-to-engage clients served by DHS and human services providers.

ATTACHMENTS

Please submit the following attachments with your Response Form. These can be found at <http://www.alleghenycounty.us/dhs/solicitations>.

- Cover Page
- MWDBE Participation Statement or Waiver Statement
- W-9
- Allegheny County Vendor Creation Form
- Budgets and budget narratives

CERTIFICATION

Please read the below statement and check the box to indicate agreement with its content.

By submitting this proposal, I certify and represent to the County that all submitted materials are my work and that all responses are true and accurate.

Attachment A: Budget & Budget Narrative FOR SECTION A

Phases	Budget Narrative	Costs	Details
Development	See below	100,000	1,000 hours (\$100/hr)
Implementation	See below	150,000	1,500 hours (\$100/hr)
Knowledge Transfer & Training	See below	100,000	1,000 hours (\$100/hr)
	Total Costs	\$350,000	

Detailed Narrative

Development

Costs related to planning and strategy meetings between CI personnel and DHS and the ensuing software development necessary to customize the CI technology platform and development of a reporting dashboard. Specific work includes:

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

- Planning and strategy sessions between our project leadership team and the DHS project team to define the goals, strategy, milestones, and time frames.
- Three to six technical sessions with DHS Technology team. In these sessions, we will conduct demos, share our IT runbooks, develop a plan to tailor the runbooks to DHS's technology environment, and also develop a plan for QA.
- Three to six sessions with DHS program directors, human services providers, and any other relevant DHS staff. In these sessions we will: conduct demos; share our survey methodology, processes, timelines, and checklists; develop a plan to tailor the survey methods to DHS's environment; and conduct demos of data analysis tools, how to customize data reports and visualizations, and develop a plan to tailor the survey analysis tool, reports, and dashboards to DHS's environment.
- SMS platform and database storage systems customization for saving and storing data in a secure way.
- Configuration of custom shortcode and keywords for the county that will help segment data in the system and allow for branded communication in the community.
- Customizing database to create automated flows and mapping between SMS platform and database.
- Customizing interface and dashboards that visualizes survey data

Implementation

Costs related to the execution, data analysis, and reporting of 20 SMS surveys. Specific work includes:

- CI personnel conduct regular check-in sessions between our project leadership team and the DHS project teams to ensure that milestones and deliverables are met, make refinements to set goals, strategies, and time frames, as requested by DHS.
- Selecting target population, designing survey questions and answers, monitoring of survey responses, delivery of any incentive. Costs include the configuration of surveys, testing of responses, acquisition of respondents, and sending costs.
- Design of branded collateral for any onsite calls-to-action for surveys.
- Customized data dashboards and visualizations.
- Integration with Existing DHS Solutions: work with DHS to incorporate data from existing channels into our analyses and visualizations. Work with DHS to design data exports from our solution that preserve anonymity but also allow for long-term DHS storage.

Knowledge Transfer & Training Phase: CI will work closely with DHS personnel to ensure effective training and knowledge transfer so DHS personnel can independently execute surveys and scale the platform across agencies. We will ensure that DHS staff is fully equipped to sustain the solution going forward. Multiple training formats and channels could include:

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

- In-person training for DHS teams
- Webinars
- On-demand video
- Technical documentation: i.e., API Guide
- Survey template examples, timelines, checklists

Attachment B: Budget & Budget Narrative FOR SECTION C

Phases	Budget Narrative	Costs	Details
Development	See below	50,000	500 hours (\$100/hr)
Implementation	See below	90,000	900 hours (\$100/hr)
Knowledge Transfer & Training	See below	30,000	300 hours (\$100/hr)
	Total Costs	\$170,000	

Detailed Narrative

Development

Includes planning and strategy meetings between CI personnel and DHS and the ensuing software development necessary to customize the CI rating solution for DHS usage. Specific work includes:

- Planning and strategy sessions between our project leadership team and the DHS project team to define the goals, strategy, milestones, and time frames.
- Two technical sessions with DHS Technology team. In these sessions, we will understand customization reporting requirements.
- Three to four sessions with DHS program directors, human services providers, and any other relevant DHS staff. In these sessions we will: review requirements for rating, develop community guidelines, assess current outreach lists, develop communications strategies.

Implementation

Costs related to the implementation of a public rating program and working with DHS to iterate effective outreach and reporting

- CI personnel conduct regular check-in sessions between our project leadership team and the DHS project teams to ensure that milestones and deliverables are met, make refinements to set goals, strategies, and time frames, as requested by DHS.

RFP Response Form

Technology Solutions to Enhance Client Feedback and Community Engagement

- Selecting target population for proactive outreach, designing outreach communications to encourage ratings, working with DHS personnel to monitor adherence to community guidelines. Costs include adjustments to the rating platform in response to user experience issues and testing approaches to outreach.
- Refinement of public and private reporting

Knowledge Transfer & Training Phase

CI will work closely with DHS personnel to ensure effective training and knowledge transfer so DHS personnel can independently run and scale the rating system across agencies. We will ensure that DHS staff is fully equipped to sustain the solution going forward. Multiple training formats and channels could include:

- In-person training for DHS teams
- Webinars
- On-demand video
- Technical documentation: i.e., API Guide
- Outreach template examples, timelines, checklists