



RFP: Volunteer Software System

Introduction:

Civic Center Volunteers was founded in 1979 and is an internationally recognized volunteer program. Over 8000 volunteers contribute to and participate in local government in Marin. Several departments of the County (Marin County Parks, Cultural Services, Health and Human Services, and Library) operate active volunteer programs and have their own volunteer coordinators. In addition, the program works with the Marin County Superior Court.

The existing CCV volunteer software system is a custom Access database which is outdated and inefficient.

Project Background:

The goal of this project is procure a volunteer system that will refine the volunteer application process; provide a searchable skills bank; allow a level of self-service for volunteers (e.g. time entry, availability, and contact information); calculate assigned values; and serve the needs of all of our volunteer coordinators.

Timeline:

Issue RFP	Wednesday, January 11, 2012
Deadline for Submission of Questions	Thursday, January 19, 2012
Deadline for Response to Questions	Wednesday, January 25, 2012
Deadline for Submission of Proposals	Wednesday, February 1, 2012
Finalist Demos	Week of February 13, 2012
Notice of Intent to Award	Week of February 27, 2012
Anticipated Contract Start	Monday, March 12, 2012

Contact Information:

Joy Fossett
County of Marin
Human Resources
3501 Civic Center Drive, Room 415
San Rafael, CA 94903
Phone: 415-473-7447
Fax: 415-473-5960
jfossett@marincounty.org

COUNTY OF MARIN, CALIFORNIA
3501 CIVIC CENTER DRIVE
SAN RAFAEL, CA 94903

Request for Proposal (RFP)
Volunteer Software System
for
Civic Center Volunteers (CCV)
at
Marin County, California

PROPOSAL MUST BE RECEIVED BEFORE:

5:00 p.m. Pacific Time on February 1, 2012

EMAIL, MAIL OR FAX PROPOSAL TO:

County of Marin
Human Resources
3501 Civic Center Drive, Room 415
San Rafael, CA 94903
Att'n: Joy Fossett
jfossett@marincounty.org
Fax: 415-473-5960

Release Date	January 11, 2012
Due Date	February 1, 2012

REFER INQUIRIES TO:

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Joy Fossett
Human Resources
3501 Civic Center Drive, Room 415
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Section A: RFP Information

A.1 About the County

The County of Marin is a stable organization comprised of 22 departments with approximately 2,000 full-time and 900 contingent employees. The County had an operating budget of \$443.7 million for current FY 2011-12 and also serves over 100 special districts with a cumulative budget similar in value to the County. The Board of Supervisors, made up of an elected representative from each of the five voting districts in this general law County, governs the County. Among several other responsibilities, the Board of Supervisors also serves as the governing board of the County's Open Space District, County Free Library, flood control districts, lighting districts, county service areas, sewer maintenance districts, the Housing Authority and the Redevelopment Agency.

The County provides a full array of services to its residents pursuant to local, State and Federal guidelines and funding. These services include countywide services such as health and human services, criminal justice, elections, property assessment, and tax collection, along with municipal services to unincorporated residents such law enforcement, parks, libraries, fire, land use permitting, roads, and infrastructure. County departments collaborate to provide high quality services and programs to the residents, businesses and visitors of the County. The central and most visible location of Marin County government is the Marin County Civic Center in San Rafael, which was designed by Frank Lloyd Wright and is on the National Register of Historic Places.

Marin County's natural sites include Muir Woods redwood forest, the Marin Headlands, Stinson Beach, Point Reyes National Seashore, and Mount Tamalpais.

For additional information, see the Marin County website at <https://www.marincounty.org>.

A.2 Project Background

An emerging issue that the Marin County Board of Supervisors is looking at are greater opportunities for volunteerism. In response to this CCV (Civic Center Volunteers) is looking to find a volunteer system that will increase efficiencies in a time of diminishing resources.

Civic Center Volunteers was founded in 1979 and is an internationally recognized volunteer program. Over 8000 volunteers contribute to and participate in local government in Marin. Several departments of the County (Marin County Parks, Cultural Services, Health and Human Services, and Library) operate active volunteer programs and have their own volunteer coordinators. In addition, the program works with the Marin County Superior Court.

The existing CCV volunteer software system is a custom Access database which is outdated and inefficient. The goal of this project is procure a volunteer system that will refine the volunteer application process; provide a searchable skills bank; allow a level of self-service for volunteers (e.g. time entry, availability, and contact information); calculate assigned values; and serve the needs of all of our volunteer coordinators.

Section B: Proposal Information

B.1 Schedule of Events

The solicitation process for this RFP will proceed according to the following schedule.
Marin County reserves the right to change the dates shown below upon written notification:

Event	Date
Issue RFP	Wednesday, January 11, 2012
Deadline for Submission of Questions	Thursday, January 19, 2012
Deadline for Response to Questions	Wednesday, January 25, 2012
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Anticipated Contract Start	Monday, March 12, 2012

B.2 Revisions to Schedule

Marin County reserves the right to change the dates in the schedule of events above upon written notification to prospective proposers through a posting on the Marin County website (<http://www.marincounty.org>).

B.3 Proposal Requirements

- B.3.1** Proposals are to be submitted in sealed packages **BY 5:00 PM PACIFIC TIME, FEBRUARY 3, 2012**. Marin County reserves the right to reject late submittals.

Submittal Address:

County of Marin
Human Resources
3501 Civic Center Drive, Room 415
San Rafael, CA 94903
Attn: Joy Fossett
jfossett@marincounty.org
Fax: 415-473-5960

- B.3.2** Failure to comply with the requirements of this RFP may result in disqualification. Proposals received subsequent to the time and date specified above will not be considered. Please note the following as part of the submittal process.

B.3.2.1 Telephone proposals will not be accepted.

- B.3.3** Proposers shall submit ten (10) hard copies and one (1) electronic (CD or thumb drive) copy of the proposal. Proposal pages should be numbered and contain an organized, paginated table of contents corresponding to the section and pages of the Proposal.

B.3.3.1 Proposers to this RFP are responsible for all costs of proposal preparation.

B.4 Evaluation Criteria

The County will review all proposals received as part of a documented evaluation process. The County will evaluate proposers according to specific criteria.

The sole purpose of the evaluation process is to determine which proposal best meets the County's needs.

The proposal evaluation criteria should be viewed as standards that measure how well a proposer's approach meets the desired requirements and needs of the County. Public sector experience is not a requirement but if proposers can demonstrate their experience with clients in the public sector, ideally local governments in California similar to Marin County, please include that information in your proposal. The criteria that will be used to evaluate proposals may include, but are not limited to the following:

Proposal Evaluation

- ***Completeness and relevance of response*** Responses should address the functional and technical requirements requested in this RFP.
- ***Cost*** Provide a cost-effective system.
- ***Company background*** Proposers should include a background of the proposing organization, supplying all information requested in Attachment 2.
- ***References*** Proposers should provide a minimum of three (3) client references who can discuss their experiences using the proposer's system.

The County reserves the right to determine the suitability of proposals on the basis of any or all of these criteria or other criteria not included in the above list.

Section C: Proposal Submittal Requirements

Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proposed products and services to satisfy the requirements of the RFP. Attention should be given to accuracy, completeness, relevance, and clarity of content. All parts, pages, figures, and tables should be numbered and clearly labeled. Company brochures, advertising and other promotional literature will not be considered adequate response. The proposal should be organized into the following major sections and in the following order:

Section Number	Section
1	Introductory Material (Title Page, Table of Contents) and Executive Summary
2	Company Background
3	Implementation & Support
4	Functional Requirements
5	Exceptions to the RFP
6	Client References
7	Compensation and Fees
8	Summary

C.1 Introductory Material and Executive Summary

(Proposal Section 1.0) The introductory material must include a title page with the RFP name, name of the proposer, address, telephone number, the date, and a Table of Contents. The Executive Summary should be limited to a brief narrative summarizing the proposal. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel.

C.2 Company Background

(Proposal Section 2.0) Attachment 2 (Company Information) should include all requested information about the proposer's company. The County, at its discretion, may require a proposer to provide additional supporting documentation or clarify requested information.

C.3 Implementation & Support

(Proposal Section 3.0) Attachment 3 (Implementation & Support) should include all requested information.

C.4 Functional Requirements

(Proposal Section 4.0) This section should include a response to the proposed Functional Requirements.

C.5 Exceptions to the RFP

(Proposal Section 5.0) All requested information in this RFP must be supplied. Proposers may take exception to certain requirements in this RFP. All exceptions shall be clearly identified in this section, and a written explanation shall include the scope of the exceptions, the ramifications of the exceptions for the County, and the description of the advantages or disadvantages to the County as a result of exceptions.

C.6 Client References

(Proposal Section 6.0) The County considers references for services to be an important part of its decision-making process to award a contract. Proposers should supply references that will be available to speak with the County. Proposers should assume that all provided references will be contacted. The County reserves the right to contact additional clients for references, if deemed necessary. Using the form attached to this RFP in Attachment 3 (References), proposers should provide a minimum of three (3) client references. Ideally, references should be similar in size to the County and have a similar scope.

C.7 Compensation and Fees

(Proposal Section 7.0) Complete and submit Attachment 4 (Pricing Schedule)

C.7.1 Cost is one of many factors that will be considered. Proposers should focus on submitting a complete proposal with accurate cost projections.

C.7.2 Do not use “To Be Determined” or similar annotations in the cells for cost estimates. The County is asking proposers to estimate prices with the understanding that assumptions may be required. Such assumptions should be stated. Proposers may submit additional pricing sheets as an addendum to the cost template; however the cost template must be completed.

Section D: Attachments

D.1 Attachment 1 (RFP Submittal Checklist)

Submittal Checklist	
Task	Submitted
Introductory Material (Title Page, and Table of Contents) and Summary	
Company Background	
Attachment 2(Company Background)	
Attachment 3 (Implementation & Support)	
Attachment 4 (Functional Requirements)	
Exceptions to the RFP	
Client References	
Attachment 5 (References)	
Attachment 6 (Compensation and Fees)	
Required Attachments	
Attachment 1(Submittal Checklist)	

D.2 Attachment 2 (Company Background)

Complete one form for each company and third-party vendor identified in your proposal.

Company Background	
Company Name:	
Location:	
Location of corporate headquarters:	
Location of nearest office/location to the County:	
Proposer Experience	
# of years in business:	
Customer Base	
# of clients:	
Any public sector and/or local government clients - if so, please provide # of clients:	
Market Focus	
Identify other industries serviced: Include any public sector and/or local government experience.	
Organization Characteristics	
Number of Employees: If Proposer is a subsidiary, identify # of employees in proposing company/division:	

Company Background	
Total Revenue: If Proposer is a subsidiary, identify revenues of proposing company/division:	
Ownership: Privately held? Publicly traded? Parent Company?	

D.3 Attachment 3 (Implementation & Support)

Describe your typical implementation plan.	
What kind of client communication and implementation planning is done prior to installation?	
Describe the training provided. Include a training outline.	
Where is your technical support center located?	
What are the methods for contacting technical support?	
What are your hours of operation for technical support?	
Describe the organization and structure of your technical support services.	
Describe the ongoing system support provided by the vendor.	
Are software upgrades provided as part of the software support contract?	
Describe your software upgrade process.	
How often are new versions released?	
How are customer requests for enhancements and customizations handled?	
Describe the recent history of system enhancements.	
If you are a web based software company, describe the network and data security you have in place if your system should be compromised (hacked), there is a natural disaster, or you experience hardware failure.	

D.4 Attachment 4 Functional Requirements

Identify how the system meets the functional requirements.

D.5 Attachment 5 (References)

List other organizations for which similar services have been provided, who will serve as a reference.

Organization Name	
Address	
City, State, Zip code	
Contact Person	
Telephone Number	
Dates of Service	

Organization Name	
Address	
City, State, Zip code	
Contact Person	
Telephone Number	
Dates of Service	

Organization Name	
Address	
City, State, Zip code	
Contact Person	
Telephone Number	
Dates of Service	

Organization Name	
Address	
City, State, Zip code	
Contact Person	
Telephone Number	
Dates of Service	

Organization Name	
Address	
City, State, Zip code	
Contact Person	
Telephone Number	
Dates of Service	

D.6 Attachment 6 (Pricing Schedule)

Proposers must submit costs for multiple users. In addition to Human Resources, all departments that have volunteer coordinators will need to have access to the system. Please quote based on 7, 8 and 9 users. If cost is based on number of volunteers, base cost on 10,000 volunteers. Also if there is an option to purchase your system outright , please provide cost information for that option..

Description	Cost
	\$
	\$
	\$
	\$
	\$
	\$
	\$
	\$
TOTAL	\$

Rqmt #	Functional Requirements	Req'd	Opt'l	Additional Description	Meets Rqmt	Does Not Meet Rqmt	Vendor's Response
ADMINISTRATIVE							
1	System can handle various types of volunteer opportunities (event specific, on-going or project).	X		Easy to post, archive and reactivate opportunities; if event specific - volunteers are able applicants to sign up until event is full, and then volunteers are put on waiting list.			
2	List volunteer opportunities in system and upload to County's website.		X	Cultural Services wants to list their own events within a password accessible system to their ushers; Library wants to list their volunteer opportunities on the Library public webpage.			
2.1	Interface w/3rd party websites to list opportunities (CVNL, VolunteerMatch, Craigslist).		X				
3	Listed opportunities will be presented so full description of opportunity is no more than one click away.	X					
4	Assign volunteer opportunity to a defined job type category for each dept/division.	X		i.e. Instead of classifying volunteer work into a job classification, a more generic category would be used to define the work.			
4.1	Ability to assign a dollar value to each category and when necessary make a global change.	X		i.e. Need to be able to caluculate the value of the work being performed.			
5	Unique identifier for each applicant	X					
6	Application to include various skills boxes in order to create skills bank linked to applicant profile.	X		Ability to upload resume to profile (mandatory) and photo (optional).			
6.1	Ability to electronically contact volunteer from the system.	X		Ability to send out mass emails to volunteers and supervisors with individual names.			
7	Review applications on-line.	X					

Does Not Meet Rqmt							Vendor's Response
Rqmt #	Functional Requirements	Req'd	Opt'l	Additional Description	Meets Rqmt	Does Not Meet Rqmt	
7.1	During review process check boxes for active, qualified, interviewing & placed. Qualified box should have private note field which is limited to CCV staff usage.	X		Customizable for background checks, HHS requirements, etc.			
8	Route electronic applications.	X		Ability to email electronic application from the system to departments or community partners with ability to cc.			
9	Ability for all Volunteer Coordinators to search for applicants based on skill.	X					
9.1	Some type of software control so applicant under consideration is on "hold" until the department releases applicant back into the available pool.		X				
10	Ability to transition applicant to a volunteer when "placed."	X					
10.1	Ability to bring up a contract which is attached to applicant profile and/or attach a scanned contract.	X		Information from application to populate contract; option to select a checkbox as to who receives monthly zero hours email reminder (volunteer or supervisor).			
10.2	Ability to autofill fields		X	e.g. phone number and address of supervisor			
11	Ability to place volunteer into and track time on the assignment.	X		Apps, contract and time sheet in system			
11.1	Ability for volunteer to hold multiple assignments & track time for each assignment.	X		If late w/time entry one reminder per volunteer (optional)			
11.2	Ability to weight/rate the work of a volunteer.		X	Cultural Services wants this feature to assign ushering duties for popular events (difficult) e.g. custom subcategories w/report capability			
12	Ability to enter retirement, recognition and other pertinent dates for each assignment.	X					
12.1	Ability to retire volunteer by assignment.	X					

Does Not Meet Rqmt							Vendor's Response
Rqmt #	Functional Requirements	Req'd	Opt'l	Additional Description	Meets Rqmt	Does Not Meet Rqmt	
13	Supervisor can complete questionnaire to recognize volunteer on assignment record.		X				
14	Ability to access program remotely i.e. telecommuting and/or smartphone, etc.		X				
15	All data is owned by County (even after volunteer has been retired) and there is a protection plan in place in case of disaster.	X					
USER							
1	Apply on-line for listed and unlisted opportunities	X		Ability for applicant to upload resume (mandatory) & photo (optional)			
2	When signing contract applicant has option to enter EEO demographics and to dump info into file	X		per Director of Human Resources			
3	Ability for volunteer to sign in and log hours at an event		X				
4	Time entry to be user friendly with option for either Volunteer, Supervisor or CCV staff to enter time for each assignment.	X					
4.1	Ability to check a box that volunteer came in if hours, days are the same each week plus option to enter different time	X					
4.2	Ability to enter detailed hours		X				
REPORTS							
1	Compute & generate reports on all fields	X		To calculate the value of volunteer services over a period of time (including zero hour reports, inactive volunteers, etc.)			
2	Generate anniversary report (monthly)	X					
3	Export name & address to Excel for mail merge	X		Ideal would be mail merge in the system			

Does Not Meet Rqmt							
Rqmt #	Functional Requirements	Req'd	Opt'l	Additional Description	Meets Rqmt	Does Not Meet Rqmt	Vendor's Response
4	Generate recognition report based on retirement date and hours worked (retired & 50+ hrs)	X					
5	Generate report of active volunteers who have signed a contract, if necessary	X					
6	Generate report of volunteers active/inactive by skill & capability	X					
12.5	Generate report of hours worked by dept./division & number of volunteers in dept/division by category and value of time contributed.	X		Financial Impact Report			
12.6	Generate a Start & End date report	X					
12.7	Generate reports by supervisor	X					
12.8	Generate report showing which volunteers/interns have not recorded time with ability to generate a group email to them or their supervisors.	X		Zero Hours report - Ideally, would like option to cc supervisor			
13	Export information to Excel	X					