

Validity & Importance of Uniform Data Collection & Reporting: Michigan Community Action  
Network Statewide Database Project

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### Abstract

The statewide database project looks at the process of implementation of a statewide database system for use among a group of agencies. The Michigan Community Action Agency Association determined that the need for a uniform data collection and reporting system for Community Action agencies belonging to their association. The reasons for having a statewide database system include strengthening the Community Action network within Michigan by having a consistent form of data collection among all agencies, improving reporting to funders by having all agencies using the same system, improving customer service by having one centralized intake process to determine program eligibility. The statewide database would provide easier access for customers to all programs to help the customer, provide security and validity of all data collected, and have additional forms of checks and balances to alleviate fraudulent activity. This project will discuss the process of choosing a uniform database system, project implementation, and results.

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## I. Community Context

### Community Profile

The Michigan Community Action Agency Association represents 30 Community Action Agencies throughout the state of Michigan. These 30 non-profit agencies offer services to low income individuals and families to help them reach self-sufficiency. Programs such as nutrition and food assistance, housing programs to assist in safe and affordable housing, utility assistance and weatherization of homes, income management, employment assistance, and linkages to local, state, and federal human services programs (MCAAA, 2010).

In 1963, Lyndon B. Johnson was sworn in as President of the United States after the assassination of President John F. Kennedy. President Johnson was determined to fight the war on poverty and made many strides toward doing so. President Johnson urged America and Congress "to build a great society, a place where the meaning of man's life matches the marvels of man's labor" (White House, n.d.). One influential piece of legislation was the Economic Opportunity Act of 1964. This Act called for the creation of Community Action Agencies with the intent on enabling those in poverty in an effort to come out of poverty and reach self-sufficiency (Miller, n.d.).

It is because of the Economic Opportunity Act of 1964 that the Community Action Agencies (CAA's) were created and exist today. The agencies focus on providing efficient services to low income individuals along with positive results that assist vulnerable individuals to reach self-sufficiency. The agencies serve their service areas with funding from federal, state, and local resources. Funding, such as the Community Service Block Grant (CSBG), designated

by the federal government, serves as a key funding source for these agencies and the services that they provide. The CSBG requires extensive and accurate reporting from agencies to determine if programs are working and who is being served. Most funders require some sort of reporting and accountability to funds used toward programs. The need for uniform reporting and collection of clean and accurate data has been a consistent issue across the years among the CAA's in Michigan.

### Community Needs Assessment

In 2009, CAA Executive Directors in Michigan were contacted by MCAAA to find out how agencies felt about purchasing a statewide database to collect customer data. The purpose of the database is to provide more efficient customer service while improving Michigan's data collection and storage. This in turn would improve reporting and allow for CAA's to tell a better story of Michigan Community Action and the constituents they serve. The initial conversation among CAA Executive Directors showed that many were interested in the idea but did not feel confident that the database would come to fruition as the MCAAA has approached the agencies many times before with the same idea, and nothing ever resulted from the previous inquiries.

The MCAAA invited CAA Directors and staff along with the Michigan Department of Human Services Bureau of Community Action & Economic Opportunity (MDHS-BCAEO) to participate on a newly created database work group. At a state level, MDHS-BCAEO is designated as the Michigan entity that oversees distribution and reporting on the CSBG, which serves as a major funding source to the community action network. The work group charge is to identify the needs of the CAA's and to research companies with databases that could meet those

needs. The database committee consists of 16 volunteers from the CAA's, MCAAA, and MDHS-BCAEO.

The Database Work Group identified, through a process of discussion at meetings and network feedback, the key challenges that the network faced with current systems and expectations of what a statewide database would need to do to meet those requirements. In order to meet the needs of the community action community, the system must meet the following needs, as stated in the MCAAA Request for Information, Appendix E (MCAAA, 2010).:

1. Single entry of client demographic data and client profile information;

- Licensing of a base software system to enter and store client demographic profile information;
- Gather and store Demographic and Household Information as a Client Profile;
- Determine Basic Program Eligibility (capture enough information to determine which programs a client might be eligible);
- Embedded client consent audit tracking for sharing of private data gathered from clients (in order to avoid other privacy consent actions);
- Program participation tracking to identify and store information about the programs which the client is participating;

2. Single interface to multiple systems;

- Building a custom middleware engine to interface between interface solution and other agency systems such as but not limited to:
  - o Case Management;
  - o Head Start - (Child Plus);
  - o Weatherization module with interface to the program's audit tool

- Senior Services (Nutrition and Chore-sharkbyte);
  - Transit programs;
  - WIC (supplemental nutrition program);
  - Custom modules (Include options for building custom modules)
3. Eased reporting, both standard and customized by an individual Community Action Agency;
- A robust reporting engine and tool to allow for future reporting interfaces and consolidation of client, agency, and state reports.
4. Custom Interfaces with separate fiscal systems.
- This may be a single interface implemented in different ways, or may be individual interfaces to transfer financial and aggregate data into fiscal systems;
  - The fiscal systems are located at each of the various local community action agencies and are not web-based systems;
  - Ability to work with Community Action Agencies on an individual basis.
5. Improved security and embedded consent to share information between program entities;
6. Reduced hardware requirements and improved support;
7. Updated platform architecture providing flexible computing environment for the future; and
8. Increased client service capability through the use of client profiles, integrated referrals and ad hoc reporting. Reports at a minimum must include:
- CSBG IS;
  - System should have capacity to create and track custom program activity fields at the client level. In addition, some agency-level information will need to be entered into the system, and merged with aggregate client-level data for reporting purposes.



## Project Target Community

The Community Action community, along with the state Bureau of Community Action & Economic Opportunity will work closely with each other, and agencies in other states, to maintain a strong network that can assist those in poverty to reach self-sufficiency. The community is in a state of constant change in terms of funding, staffing, programmatic needs, community needs, etc. The CAA's work collectively toward alleviating poverty in the areas they service. The Database Work Group will launch change within the network which will assist in meeting all of the Michigan CAA network needs and goals.

## II. Problem Analysis

### Problem Statement

The MCAAA represents 30 CAAs throughout the state of Michigan. These 30 non-profit agencies offer services to low income individuals and families to help them reach self-sufficiency. They offer programs such as nutrition and food assistance, housing programs to assist in safe and affordable housing, utility assistance and weatherization of homes, income management, employment assistance, and linkages to local, state, and federal human services programs (MCAAA, 2010). The Michigan CAA network, which provides fundamental services to low income and vulnerable individuals and families, lacks a uniform and valid source of collecting and reporting information which would increase efficiency, improve business practices, and provide for better customer service. A statewide database used by all entities in the Community Action network would provide an accountable and consistent collection of data, a

dependable system to ensure customers are receiving the best in benefits and reduce fraudulent activity.

### Stakeholders

The project has many stakeholders, or those that serve to be affected by the project. The MCAAA is the contract holder and designee for the statewide database. The Michigan CAA Directors will allocate funds for the purchase of the statewide database. The Michigan CAA staff will use the system each day. The MDHS-BCAEO, the Michigan recipient of the federal CSBG funding, will provide input and advice when considering the reporting capability of the system. The customers served by the CAAs will apply and receive services in a different format than in the past. The community partners that serve to assist customers in the community, in partnership with the CAAs, will see a change in the way of doing business within Community Action in Michigan. Finally, the companies that present their programs to the CAA network also serve as stakeholders as they will have to provide some adaptability to make changes that will meet the needs of Michigan.

The CAA Directors work is to ensure that the new database is affordable for their agency, will provide a more effective and efficient way of collecting and providing data to assist in improving agency day-to-day operations, and is user friendly for agency staff. The CAA Directors and their opinions will influence MCAAA as to which statewide database will be the best choice for the state and its CAA community.

The CAA staffs have an important role to play as the ease of using the system and the transition from current systems to the new selected database will mostly be determined by them. The staffs serve as intake sources for customers looking for assistance and end users for each

agency entering customer data. The CAA staff opinion and knowledge of customer intake and casework processes will influence the CAA Director during the decision-making process for the statewide database project.

The MDHS-BCAEO will also represent a stakeholder in the statewide database process. As the database purchase and maintenance fees will be paid with a portion of federal funds; the CSBG and Weatherization Assistance Program (WAP) funds. The state will provide insight as to which database would meet required federal and state reporting needs most efficiently. The MDHS-BCAEO will also designate a project manager for the statewide database purchase who will oversee the initial stages of training and utilizing the system among agencies.

The customers served by CAA's are stakeholders in the statewide database project. The customers applying for, and receiving services within agencies will change once the statewide database is chosen and implemented. The statewide database will provide CAAs with the ability to serve their customers with a more streamlined process and provide more ease in the application process and receiving of benefits.

Finally, the software companies with statewide database products are also stakeholders in the statewide database project. They need to influence the other stakeholders, ensure that the needs of the network are can be met by their product, and ensure that changes can be made, if needed, to make the system Michigan specific.

#### Project Goal(s) in CED Terms

The current strengths within the CAA network is that they have a full understanding of the programs they offer to low income customers within their defined communities. The CAAs

also have knowledge in collecting data and meeting reporting requirements along with knowledge of the reporting requirements for each of the programs that they offer.

A weakness within the CAA network is that agencies have different levels of technical and computer knowledge which can impede or assist CAAs move forward. Another weakness is an unfavorable view toward change in any capacity. Some agencies have expressed discontent with the idea of having to change current systems. Currently, CAAs have their own method of collecting and tracking data for customers that they serve. This collection and tracking is different among each agency throughout the network and not always consistent.

There are many opportunities that have been identified for the CAA network with the purchase of a statewide database. By streamlining the benefits application process, customers receive information on additional benefits which will allow them more opportunity to get program assistance toward self-sufficiency. By acknowledging all the barriers for a customer in need, it is possible to offer and or refer them to programs that could tackle all of their issues (Single Stop USA, 2010). A statewide database can also provide a uniform system of reporting among agencies within the community and give more validity to data reported on a statewide basis. A shared database can assist agents with noticing fraudulent activity as the database will provide information on whether the customer has been served in another agency or is currently being served by another agency (Single Stop USA, 2012).

Along with opportunities for any project, there are also threats that can be identified with the statewide database project. These include potential cuts in funding for programs that may assist in payment for a new database purchase and continued maintenance fees. Another threat to the project is that different funding sources require use of their database for collection of data

and reporting. The CAAs are required to have to use multiple databases for multiple funders. It is not possible to store data collected in one database unless agencies use multiple entries into multiple systems or create bridges between each database to communicate and share data. A final threat to the project is the potential for reporting requirements to change and therefore the data collection procedure or data points may need to be changed (Enterprise Systems, 2011).

The community, identified as the Michigan CAA network, would benefit from having a statewide database in many ways. Currently there is no a uniform system of collecting and reporting data for the community as a whole. There is not proof of validity of data if each agency within the community is not uniform and consistent with its collection and reporting. By having a statewide database, CAAs will have the ability to better serve customers by offering them more services at once rather than upon application of needed services at one time. CAAs having the ability to provide valid and consistent data could provide a stronger foundation to potential funders and possibly provide an advantage to competitive grants. Also, having a database that can provide multiple services to a customer in one visit could potentially save money for CAAs in the long run as they can evolve with the needs of the community and shift money to necessary projects that may change in the future.

<b><u>STRENGTHS</u></b>	<b><u>WEAKNESSES</u></b>
<ul style="list-style-type: none"> <li>• CAAs have a strong understanding for each program that they offer.</li> <li>• CAAs have knowledge of program reporting requirements</li> <li>• CAAs have experience working with data collection and assisting customers.</li> </ul>	<ul style="list-style-type: none"> <li>• CAAs are at different levels as far as technological know-how and understanding</li> <li>• CAA staff tend to dislike change at this capacity</li> <li>• Each agency documents data differently and each agency feels their system works best.</li> <li>• There is evident difference between the agencies that want to progress forward and those that wish to stay where they are.</li> </ul>

<b><u>OPPORTUNITIES</u></b>	<b><u>THREATS</u></b>
<ul style="list-style-type: none"> <li>• Streamlined application process to better serve customers</li> <li>• Universal system of collecting data which will provide more accurate and consistent reporting to state/federal government.</li> <li>• Less chance for fraudulent activity.</li> <li>• A chance for the MI CAA community to serve as an example to other states</li> <li>• A chance to really help those in need reach self-sufficiency.</li> </ul>	<ul style="list-style-type: none"> <li>• Some CAAs and CAA staff may be resistant to change</li> <li>• Funding cuts and potential costs may serve as an obstacle when committing to a database.</li> <li>• Continued use of various systems required by different funding sources.</li> <li>• Continued reporting and data collection requirements change often.</li> </ul>

### III. Literature Review

Streamlining human service agencies to better serve customers and to assist customers in reaching self-sufficiency is not a new idea; rather, it is just new to implementation over the past few years. Over 20 states have purchased statewide databases in an effort to improve data collection and a uniform way of tracking results along with streamlining customers and the process of providing assistance. (Durr, 2011) Interconnectivity among agencies that is able to provide the same or similar services throughout the same state can provide a more secure format for storing data and eliminating fraud. Research has also shown that by having a system that determine eligibility for all programs offered by an agency, allows for better results when helping a customer out of poverty. A project of this caliber involves a large degree of planning and awareness of challenges and assumptions to prepare for all occurrences (DiSantis & Foss, 2012).

The United States Department of Health and Human Services provided information regarding the government's support of technology and moving toward more efficient systems that have interconnectivity capability. The United States Department of Health and Human

Services provided a history of challenges experienced with interconnectivity of programs which provided examples technology project implementation. As a result of the American Recovery and Reinvestment Act of 2009, the Health Information Technology for Economic and Clinical Health Act (HITECH) was enacted. This act was created to improve healthcare technology while still protecting the privacy of patients. Technology is very modern and incorporating it into governmental systems leads to many security measures that need to be set in place. In December 2000, the United States Department of Health and Human Services established privacy rules for the Health Insurance Portability and Accountability Act of 1996 (HIPPA) which, due to constant change and security concerns, was later modified in August 2002 and again in February 2003. These rules protect the integrity of data along with confidentiality of patients (United States Department of Health and Human Services, 2013).

NASCIO, a company that assisted the state and the federal governments with the implementation of technology changes to meet the needs and challenges of the HITECH Act. NASCIO outlined the history of technology and government along with the expectations of the Act and how states could best meet the requirements. NASCIO provided guidelines for states to take to effectively implement the changes and expectations of the federal government. Along with guidance, NASCIO created NIEM, National Information Exchange Model, which is a model for states to improve data quality (NASCIO, 2013).

In 2010, Single Stop USA, a non-profit agency geared toward creating a one stop system for those in poverty to get access to all programs that can assist them on the road to self-sufficiency, rather than just one program when they need it, acknowledged the need for a more streamlined system for human service agencies. Single Stop USA suggested that by improving

technology, such as a single application system for all human service programs, interconnectivity among human service programs, easier access to benefits along with closer working relationships among the human services community provided a more effective process and improved results toward helping families and individuals reach self-sufficiency (Single Stop USA, 2010).

Single Stop USA took their research to the next level by showing the ongoing movement toward upgrades in technology in human service agencies in states across the United States. By establishing uniform eligibility requirements across programs, using data warehouses that could house data from multiple systems and allow for the sharing of data, and modernizing the human services program system to better assist customers while establishing uniform validity of data collection, would bring together a strong system of data collection along with a better picture of the customer and how to better assist him/her with reaching self-sufficiency (Single Stop USA, 2012).

Single Stop USA also outlined the recent interest among state and federal government in the interconnectivity of programs for a more effective government. By improving access to benefits for customers along with maximizing technology to better collect and save data for comparisons, entities were able to run more efficiently and also save money as data is shareable and assistance is offered once, rather than among many different agencies (Single Stop USA, 2012).

Enterprise systems, with grant money award to community action networks, conducted a study among states where Community Action networks have implemented statewide data systems. The information collected by Enterprise systems provided an overview of the pros and cons of statewide databases. Over twenty states have purchased a statewide database they have



implemented or are in the process of implementing. The information provided is based on the functionality of the systems, challenges experienced, benefits to the system, and suggestions from states for implementation (Enterprise Systems, 2011).

Lyndell Durr researched the topic of statewide databases among Community Action networks throughout the United States. Mr. Durr, familiar with the United States Department of Health and Human Services push for a new Human Services approach, Human Services, 2.0, which focuses on interconnectivity of technology, compared statewide databases in Community Action networks to the goals of the Department of Health and Human Services. Durr provides information collected from states with such database implementation and how the technology has changed the way of doing business (Durr, 2011).

The resources identified have provided an overview of project planning, implementation, and outcomes achieved. The information provides details of the various approaches taken with improving and upgrading technology for large communities along with providing the need to do so. The experiences are similar in most cases and challenges have been similar. Comparisons of other states and their experience with statewide database projects, along with comparisons at a federal, larger scale, will provide comparable data and integrity to this project.

#### IV: Project Design/Logic Model

The Statewide Database project design can be viewed in logic model format. The table below provides the reader with the short-term outcome portion of the overall project logic model.

## Problem Analysis

Effect	By not having a uniform process for collecting data and reporting data, the state of Michigan Community Action Agencies are at risk of losing funding opportunities and also a way of supporting the claims that the programs they offer help low income individuals toward self-sufficiency. Also, by offering services individually rather than bundled services, agencies are not offering customers all opportunities to assist in moving out of poverty. This problem affects thousands of customers in the Michigan Community Action Agency service area. Politically, lack of validity of data and bundled services gives government officials/funders a lack of trust in the programs as poverty still continues to exist and there are not any real standards to show success in programs. Economically, future funding is always in jeopardy. The funding assists low income individuals and if funding were to be discontinued, those low income individuals would lose assistance that is only provided by community action.		
Problem Statement	The Michigan Community Action Agency network, which provides fundamental services to low income and vulnerable individuals and families, lacks a uniform and valid source of reporting and customer data collection which would increase efficiency and improve business along with improving customer service. A statewide database used by all 29 entities in the Community Action network would provide a constant form of valid data collection along with a dependable system to ensure customers are receiving the best in benefits and reduce fraudulent activity.		
Causes	Although technology has been advancing, CAAs are limited in funding and have not always had the means to advance their agency data collection and reporting with the technology.	Many funding sources require use of their databases to store information. So with each acceptance of a grant came acceptance of a new database to store data. Over the years, there are multiple databases that do not interconnect to each other thus creating multiple entries into multiple databases.	Finding a shared database that collects all necessary elements to meet reporting requirements, provides ease of use for all levels of users, and also is fiscally affordable for all agencies in the network.

## Outcomes

Long-term Outcome	State of Michigan having a reputable system of reporting that provides data integrity, better customer service by offering all services customers are eligible for in one visit, and the ability to tell an accurate story of Community Action in Michigan.		
Intermediate Outcome	Create linkages of communication and data sharing between the chosen statewide database and other databases required by other funding sources.		
Short-term Outcomes	Create a workgroup to define what the statewide database should provide and consist of, schedule presentations, and purchase the database.	All CAAs utilizing system for state chosen programs within a year of purchasing the database.	Eliminate the work of CAAs having to submit at least 3 required reports- state will pull directly from statewide database rather than the CAA creating report and submitting. Thus, eliminating work for CAAs.

The short term goals for the project are to find a statewide database to purchase for CAAs in Michigan. This will mean identifying a system that can meet the criteria that the database work group has identified and making a decision as to which database to purchase that will meet the needs of the community.

Another short term goal for the project is to implement a training plan for the database for all agencies. The goal is to have all agency system administrators, those designated to serve as in-house support for the chosen database, trained and knowledgeable about the designated database. This plan will need to be implemented within 3 months of purchasing the database.

The final short term goal of the project is to have agencies utilizing the database within 6 months of purchase for all programs overseen by MI-DHS BCAEO along with any additional programs

that do not require another database to be used. Another long term goal is to work with other databases and create software communication between databases to eliminate duplicate entry and/or more work for agencies.

### Activities

Short-term Outcomes	Create a workgroup to define what the statewide database should provide and consist of, schedule presentations, and purchase the database.	All CAAs utilizing system for state chosen programs within a year of purchasing the database.	Eliminate the work of CAAs having to submit at least 3 required reports- state will pull directly from statewide database rather than the CAA creating report and submitting. Thus, eliminating work for CAAs.
Outputs	30 CAAs, the state association, and the state purchase a statewide database for client data collection and case management.	CAAs across Michigan are trained and using the chosen database correctly.	The state CSBG office can collect real-time data at any time and eliminate CAAs from the responsibility.
Activities	<ul style="list-style-type: none"> <li>-Identify participants for the workgroup.</li> <li>-Define priorities and needs for which database must possess.</li> <li>-Identify companies that have databases which could meet the needs.</li> <li>Select a database to purchase.</li> </ul>	<ul style="list-style-type: none"> <li>-Create a training plan for all CAA staff including end users, management, and agency database system administrators.</li> <li>-Create a system of providing additional training and assistance to CAAs for the database.</li> </ul>	<ul style="list-style-type: none"> <li>-Identify key data points that need to be collected for various required federal reporting.</li> <li>-Create policy requiring use of the database and data entry for the identified programs.</li> <li>-State begins to pull reports rather than CAAs having to pull data and submit.</li> </ul>

## V. Methodology and Implementation Plan

The statewide database project involves support and participation from various entities and people during the project implementation. The implementation plan extends approximately 15 months from conception to full use of the database. The plan involves choosing a database, purchasing the database, creation of a training timeline, and a timeline for completion of the project.

### Participants and Stakeholders

Implementation involves the participation of many different agencies that all have varying degrees of interest in the state community action network purchasing a statewide database. These participants will have varying degrees of responsibility within the project which will be described in this section.

The CAAs will serve as the largest population of users of the statewide database. Agency intake staff will utilize the system daily to enter information on each customer entering their agency looking for services. The agency Director will have to approve the purchase and secure funding for the purchase and for any sort of maintenance agreement in the future. Staff as a whole will need to be trained on the database and its ability. It is expected that the state of Michigan will have at least 465 users of the chosen database using estimates of the number of employees of CAAs. The agency management and tripartite board will utilize the data in the system to strengthen their message of the agency to future funders, government officials, and community partners.

The MCAAA will oversee the project and negotiate the contract for purchasing the database from the chosen vendor. The association will also coordinate the Database Work Group and oversee the work of the committee. The association will also assist in training of database after the purchase has been made. The MCAAA will assign approximately two staff members to monitor the database project.

The MDHS-BCAEO provides oversight for the CSBG and will play a significant role in the execution of the database project. The office will have a voice in the decision of which database to purchase as it is responsible for collecting data to report to the state and federal government. Staff of the MDHS-BCAEO will also utilize the system in efforts toward monitoring agencies to ensure they are meeting the requirements of the grant. The office will utilize the chosen database to extract the necessary data. The office will also provide support when necessary to the network regarding the database and how to properly enter data needed for the state office programs.

Other participants and/or stakeholders for the database project include customers that need services. It is anticipated that customers will have to change the process in which they have historically applied for services to adapt to the database intake. This could be a change in information requested from the customer during the intake process, a change in the customer agreement clause to accommodate for shared data and where/what the information could be used for, and possibly a change in eligibility criteria for some services.

The chosen vendor is also a participant in the statewide database project. The vendor will provide training necessary for use of the database along with ongoing technical assistance for the life of the contract. The vendor may be asked to make changes to the system in order to

accommodate the needs of the network. The vendor will also need to participate in annual meetings with MCAAA to keep the network update on potential changes and also be available to discuss potential issues within the chosen database.

### Host Organization

The host organization for the statewide database project is shared between the MCAAA and MDHS-BCAEO. The contract will be with MCAAA as a representative of all community action agencies in Michigan. They will negotiate the initial contract and future contracts for the agencies. MCAAA can also access the data stored in the database to assist with legislative efforts for the network.

MDHS-BCAEO will serve as a training entity for the database in the initial stages of the project. Training will be provided to agencies, specifically regarding MDHS-BCAEO programs, to ensure the proper data collection to meet reporting requirement needs. The office will utilize the system for data collection on all programs and to meet reporting and monitoring requirements.

### Project Roles and Staffing

The database project will require significant dedication of staff during implementation from all participants involved in the project. Overall, each partner or stakeholder will play a part in the project performance in a variety of ways.

Each CAA will designate at least two staff to serve as champion users of the selected database. These key people will assist in technical support along with training efforts for their agency. The designated employees will assist their agency with extracting data, set up of the

MDHS-BCAEO will designate at least one person to assist agencies with any technical issues that are not able to be solved at the agency level. The staff person will provide training to the agency designated staff and will schedule an annual meeting of those designated staff.

### Project Implementation Gantt chart

ID	Task Name	Start	Finish	Duration	2010											
					Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	Establish Database Committee/ choose database	01/01/2010	06/30/2010	25.8w												
2	Purchase database	07/01/2010	08/31/2010	8.8w												
3	Implement Training Plan	10/01/2010	12/01/2010	8.8w												



## Budget

The budget for the statewide database was limited to no more than \$1.2 million dollars with ongoing costs of no more than \$190,000 per year total for the state of Michigan. These fees would not include additional change requests or potential system mergers. Funding has been figured by using the American Reinvestment Recovery Act funding along with other grant sources to improve technology in Michigan. (Appendix C)

## VI. Monitoring

Monitoring of the statewide database project progress will be done by the Michigan Community Action Agency Association and the Michigan Department of Human Services-Bureau of Community Action and Economic Opportunity. These entities will monitor the activities and indicators identified to ensure that the outcomes for the project are being reached. Three levels of outcomes have been identified; short term, intermediate, and long term. (Appendix D)

Each outcome identified for this project has activities or indicators that will be completed which will gauge if the outcome has been met. This work group for this project has identified the short term outcome as the MCAAA purchasing a statewide database. Indicators for this outcome have been identified as the following:

Identify participants for the database work group. MCAAA will contact Community Action Agency Directors and the Bureau of Community Action & Economic Opportunity to identify volunteers for the committee. Those volunteers will then commit to the work group.

Define priorities and needs for which the selected database must possess. The workgroup will spend time identifying similar programs each agency offers along with the collection of information that the network must collect. This data will be used to identify the database. MCAAA will oversee the database and keep record of its progress.

Identify companies that offer databases that offer what the network will need and release an official request for information from those companies. The companies will send information, potential proposals, and the work group will use this information to determine which database to select for purchase. MCAAA will oversee the Request for Information and the interaction with the companies.

Select a database to purchase. The workgroup will review the information collected and determine which database the state will purchase. Each member of the work group will have a vote for their agency on the database. They will only have one vote. MCAAA will conduct the vote and will tally the results. They will also contact the selected company and proceed with the contract process.

The intermediate outcome of the program is that all agencies are using the statewide database within one year of purchase. Indicators used to gauge the success of this outcome have been identified as follows:

Create a training plan for all agency staff across the state and implementing the plan. The training plan will be created by the chosen company along with MCAAA and MDHS-BCAEO. Both entities will participate in the training process. The process will be overseen by MCAAA.

Create a system of additional support and training requests for the network after the initial training plan has been completed. This process will be created by MCAAA and MDHS-BCAEO. MDHS-BCAEO will process and conduct additional training requests and MCAAA will continue to receive updates.

The long term outcome identified for this program is all agencies in the network will be using the database for one intake for all programs and data collection and reporting for all programs. Indicators for this program have been identified as:

Identify and re-evaluate key data that will need to be collected for various funders of the different programs offered at each agency. This process will be overseen by MCAAA.

Create policy which incorporates the new database and the mandatory use of the database for collection of data. The process will be completed by MDHS-BCAEO for the programs that MDH-BCAEO administers.

State begins extract mandatory reporting data from the statewide database. This process will be conducted and overseen by MDHS-BCAEO staff as a way to eliminate the compilation and due dates from agency staff by utilizing the statewide database for real-time data and extracting the reports for the agencies.

## VII. Evaluation

Evaluation of the statewide database project will be conducted to determine if the project is successful. The definition of success for this project is to identify if the pre-determined goals and outcomes for the program were met and also to identify challenges experienced during the process. Additionally, comparing information collected from the new statewide database and the

previous year's data collection prior to the purchase of the statewide database, will serve as an evaluation tool. Ultimately, the evaluation will determine the pros and cons of using a statewide database and to determine if the project aides in the overall improvement of the Community Action network in its daily activities and services offered.

#### Evaluation Variables and Indicators

The evaluation will examine the implementation of the program, the operation of the program, and the impact of the program after implementation. The project will evaluate the following project outcomes:

- Did the statewide database workgroup identify the needs of the network and successfully purchase a database?
- Were all CAAs using the database within one year of purchasing the system?
- Was the Bureau of Community Action & Economic Opportunity able to eliminate at least 3 mandated manual reports from agency responsibility and replace the process with Bureau staff extracting the data from the statewide database?

The evaluation will provide analysis of the project progression and the necessary determinants to evaluate the effectiveness of the program and share the information with stakeholders and partners.

#### Evaluation Gathering

The statewide database project has identified three short term outcomes that will evaluate if the project has reached the outcomes that have been pre-determined by the stakeholders. Each

outcome has outcome measures that will identify if the outcome has been met. This data will be used to evaluate the success of the program.

Short-term Goal 1: A work group has been created to identify a statewide database.

Outcome measures for this goal consist of the stakeholders creating a timeline for the research and decision of which database to purchase. Measures for this goal are as follows:

- A work group is created with a variety of network staff, director's, association staff, and state staff to engage in the process of purchasing a statewide database. The creation of the work group will be led by the state association and all records will be documented and kept by the association.
- The work group identifies the technology needs of the Community Action network and created a Request for Proposal for the database. This will be documented in meeting minutes and kept by the state association.
- The workgroup identifies a database to purchase by all agencies within a specified timeframe. This will be documented by meeting minutes and stored by the state association.

Short-term Goal 2: All CAAs are actively using the database within one year of purchase

Outcome measures for this goal consist of actively training the network so that the CAAs can utilize the statewide database.

- A training timeline is created and implemented by the work group and vendor. This will be documented in work group meeting minutes and the state association will store the minutes.

- Identify a system of support for the database for CAAs to be used after the training plan has been completed. This will be documented in work group training minutes and network correspondence and stored by the state association.
- Create monthly reports to assess usage levels of each agency. Contact agencies that have lower usage rates to determine if additional training is needed or identify reasons for not using the database.

Short-term Goal 3: Eliminate three reports that CAAs are required to report manually by the state pulling the data from the statewide database, thus eliminating the agency of the responsibility of sending the report.

- Identify the data points that are required for each report. This will be conducted by state staff and shared with the network via policy and correspondence to the network by the state agency.
- State office creates policy requiring the use of the statewide database and reflecting that the reports will be extracted by the state office staff with a deadline. The policy will be shared with the network and made available to the network on the statewide database.
- State staff begins extracting required state and federal reporting to eliminate the work from the CAAs. Documentation of reports extracted from the database will be kept by state staff. CAAs will also be able to access the reports using the database.

#### Evaluation Team/Tasks

The researcher serves as the project manager for the statewide database project and will serve as the evaluator as determined by the stakeholders. The evaluation team will consist of one MDHS-BCAEO assigned staff person and one MCAAA assigned staff person. The team will

monitor the evaluation timeframe and document results throughout. The team will present updates of the statewide database project, based on information collected during the evaluation, and report findings to the MCAAA Director.

#### Evaluation Schedule

Short-term Goal 1: A work group has been created to identify a statewide database.

The designated evaluators will monitor the database work group and deadlines to ensure that the work group is staying on track and meeting the deadlines as determined by the timeline. The team will monitor and evaluate after each work group meeting.

Short-term Goal 2: All CAAs are actively using the database within one year of purchase

The evaluation team will monitor the training plan implementation as determined by the vendor and the work group. The evaluators will evaluate the training plan by using the timeline and whether or not the training plan is successfully being implemented by the vendor by the completion of training determined by the work group. MCAAA will be responsible for surveying and collecting survey data from users within the community action agency network. The evaluators will also pull reports from the chosen statewide database to monitor usage levels by agency.

Short-term Goal 3: Eliminate three reports that CAAs are required to report manually by the state pulling the data from the statewide database, thus eliminating the agency of the responsibility of sending the report. The MDHS-BCAEO will determine the three required reports that will be extracted from the database.

The evaluation team will determine if this goal is met by documenting policy revision dates incorporating requiring reporting data be entered into the statewide database. The evaluation team will also evaluate the MDHS-BCAEO experience with reporting using the database. Focus will be placed on timeliness of reports, accuracy of reports, and any identified technical issues experienced by the MDHS-BCAEO or the CAAs. This information will be obtained from MDHS-BCAEO staff.

## VII. Sustainability

### Sustainability Elements

The current environment is based on multiple databases and inconsistent data collection among agencies for different programs. The statewide database creates a uniform collection of data among agencies in one location. Sustainability Elements are defined in terms of financial, political, and social.

Financial: Funders typically want a grantee to have a reliable way of tracking data and expenses for the program that they fund. They also require reporting of this data to ensure that their funding is being used appropriately and meeting the goals of the program. The statewide database provides agencies with the capability to meet these requirements. Long-term advantages include the capability of setting up programs and reporting to meet the needs of various funders. The statewide database has the capability to interface with other systems which will provide a more holistic approach to assisting Michigan's vulnerable populations in working toward self-sufficiency.



Political: Oftentimes, states serve as a major funder for community action programs. Although money is given to the states from the federal government, states have the ability to add their own layers of requirements for the funding in addition to confirming eligibility and collecting demographic data on those served.

In Michigan, legislators often add additional data collection and reporting to different funding sources. For example, the Michigan legislator have added additional reporting requirements for the Michigan Weatherization Assistance Program funding which includes collecting the State Equalized Value for each household weatherized and the type of house weatherized. The statewide database provides a system of eligibility verification and also a way to collect the additional required data and extract in report form.

Additionally, CAAs are guided by a governing board. The board oversees the agency activities, spending, and overall operation. Board members can utilize the system to monitor agency activity and have real time data on those the agency is serving and in what capacity.

Social: The statewide database provides a link between agencies that has previously been missing. Agencies can search a client within the system and see if they are receiving benefits at another agency. The statewide database provides agencies with a better line of communication not only with customer research but also to share how each agency operates each program. Previously community action in Michigan was the silo approach, although all representing a community action, each agency ran programs with only internal decision making. Now, with the statewide database, agencies are more likely to discuss with neighboring agencies how they run programs and how they track information. The database has provided a holistic approach to community action.

## Sustainability Plan

The BCAEO has worked with the vendor, DBA Technologies, L.L.C., to build into the system state and federal reporting accountability tools to ensure that CAAs can provide funders, state, and federal funders with the data they need. DBA Technologies, L.L.C. has also worked closely with CAA leadership and staff to determine what additional tools would be beneficial for their agency. CAAs have determined that an interface with other required databases would assist in eliminating dual entry into multiple systems. DBA Technologies, L.L.C. has offered to assist in the process and the state association will take the lead on working with the other funders and their systems.

Advances in technology occur every day. These changes and advances can provide more efficient practices for CAAs. If the vendor along with the CAAs, MCAAA, and the BCAEO continue to stay informed of changes that could be beneficial for the community action day to day operations then it would help the system be sustainable and successful.

## IX. Results

The statewide database project has met the short term outcomes determined at the beginning of the project. The short term outcomes were created to represent the first set of changes and identified for the project as:

- Short term Outcome 1: Create a workgroup to define the statewide database project and to determine a system for the CAA network to purchase.
- Short term Outcome 2: All CAAs use the system for intake and case management for BCAEO programs within 1 year.

- Short term Outcome 3: The BCAEO to eliminate at least 3 reports manually completed and reported by CAAs to BCAEO. The reports will be extracted from the statewide database by BCAEO staff.

The following section provides an overview of the results of each short term outcome identified for the statewide database project.

#### Short Term Outcome 1: The workgroup

Activities for the statewide database work group were identified as 1) The MCAAA contacts CAA Directors and the BCAEO to recruit volunteers for a statewide database work group 2) The workgroup identifies the priorities and needs for which database must possess 3) Select a database for the community action network to purchase. These activities were clearly defined by MCAAA at the beginning of the project and shared with all participants of the workgroup.

The workgroup consisted of 18 members representing various counties across Michigan and the BCAEO. The workgroup members committed to choosing a statewide database to purchase for the network. The members also committed to meeting monthly and via phone conferences as needed to meet the deadlines as defined by the timeline.

The group successfully identified the needs of the CAA community and prioritized the features the chosen database must include. This process was completed by identifying the key points of data that are collected for a majority of programs and necessary for reporting, the common programs agencies offer throughout Michigan, program requirements and the

database/tracking system each CAA used for those programs. This information was then used to determine the requirements of the database.

During the process of determining priorities for the program, it became evident that each agency identified different programs as their largest program and top priority. Because of this, determining exactly what the database would need to collect became unclear. The facilitator, a staff person from MCAAA, had to bring the focus back to the project and identify the necessities. Although the conversation caused a detour from the agenda, it provided CAA staff to realize that although the network is working toward the same goal of self-sufficiency for its clients, each agency is very different in terms of programs offered.

Using the identified priorities necessary for the database, the workgroup provided the MCAAA with the information and this was used to create a Request for Information (Appendix E). The MCAAA posted the request and those companies interested contacted the MCAAA to present their product to the work group. Upon reviewing the presentations, the work group scored each presentation following which the MCAAA proceeded to post a Request for Proposal. (Appendix F) The workgroup reviewed the proposals and then chose three companies to present to the workgroup; of those three companies, one was chosen for purchase. The group identified, FACS Pro, a statewide database created by DBA Technologies, Inc.

The workgroup met all their deadlines within the timeline and attained the short term goal of purchasing a statewide database for the CAA network in Michigan. The actual purchase of the database was delayed due to contract negotiation between MCAAA and DBA Technologies, Inc. The purchase was delayed by one month, following a contract signed and the next phase of the project was to begin. (Appendix F)

Although the workgroup consisted of 17 members, of those members, only 11 CAAs out of 30 were represented. Ideally, it would have been good to have had more representation of all CAAs. The MCAAA provided the network with updates and meeting minutes each month in an effort to keep all agencies informed of the progress of the project.

#### Short Term Outcome 2: Utilizing the System

The activities identified to meet the short term goal of all CAAs utilizing the system for intake, eligibility determination, and case management for all BCAEO programs included 1) MCAAA, the statewide database workgroup, BCAEO, and DBA Technologies, Inc. creating training plan for the network to ensure that the System Administrator identified by all individual CAAs were trained on the use of the database, 2) create a system of communication for assistance between CAAs and DBA Technologies, Inc. These activities were defined by the workgroup upon purchasing of FACS Pro.

DBA Technologies, Inc. held a kick off meeting with the workgroup to create a training plan for CAAs across the state for FACS Pro. The workgroup discussed various ideas and felt that training was a priority as it would be an important determinant in success of the database. Initially, DBA Technologies, Inc. offered to provide regional training (4 trainings total) to the network. After negotiations with the workgroup, DBA Technologies, Inc. offered to provide the regional trainings throughout the state to the network and also to spend 3 days at each agency (30 CAAs and 1 LPA total) within a 3 month timeframe in order to ensure all CAAs were trained and able to utilize the system.

The workgroup and DBA Technologies, Inc. then reviewed the best plan to provide assistance to the network and when an agency would need further guidance with the statewide database. DBA Technologies, Inc. created a help desk email. The workgroup was to identify designated Super Users within the state that would oversee the help desk and provide assistance to the agency system administrators. The workgroup identified 1 BCAEO staff to serve as the state Super User for the state. This staff person would be added to the help desk email and would be responsible for setting up programs, troubleshooting issues, and providing training and guidance to CAA System Administrators when needed.

Upon determining the FACS Pro Super User, the BCAEO and DBA Technologies, Inc. voiced concern over having only one person identified to serve as the Super User. The members of the workgroup also agreed that this was a concern. Although some of the workgroup participants were not comfortable with any other entity having access to their customer data. Because of this, the decision for the one BCAEO staff person to serve as the FACS Pro Super User remained unchanged.

The training plan provided multiple opportunities for CAAs to become familiar with FACS Pro from the end user level to the agency director. The regional trainings provided an overview for CAAs in the same service areas and a time for questions and answers from the CAAs. The one on one training provided CAAs with three days of training to set up their system, training review, and individualized training. After the completion of the training plan, it was found that at least five agencies were going to need additional training as they did not take full advantage of the training provided. The reasons for this was not clear but overall it seemed those agencies had a misunderstanding of the purpose of the statewide database and the training

provided. It is because of this that there were issues with immediate use and understanding of the database as the project progressed.

The five agencies that were struggling had to have a quick lesson and began utilizing the system at the last minute and were not as trained in order to meet the policy requirements of using FACS Pro. This caused some invalid data input into the system and an influx of help desk emails which therefore caused more work for the state Super User. The workgroup had not identified this as a potential issue in the planning process.

### Short Term Outcome 3: Less work for CAAs

The activities identified by the workgroup to reach the short term outcome of BCAEO eliminating three manual reports from CAAs and having BCAEO staff extract the data from FACS Pro included 1) BCAEO to identify the key reporting elements of all reports and determine three reports that could be extracted by staff in order to ease the burden off the CAAs 2) BCAEO to update and create policy to incorporate reporting processes and the use of FACS Pro 3) BCAEO to determine how to extract necessary data from FACS Pro and beings to extract agency data for reporting purposes.

BCAEO policy staff, grant managers, and reporting staff held a series of meetings to review all reports that are required of CAAs by BCAEO. The meetings proved successful not only in determining the three reports to eliminate from CAAs but also identified reports that were no longer relevant. Overall, BCAEO identified the three programs to eliminate but also provided the opportunity for BCAEO to review all reports.

BCAEO policy staff, grant managers, and reporting staff then needed to update policy items to address the use of FACS Pro and to identify the change in the reporting process. The policy updates were completed within thirty days and then sent to the network. The policy was also updated on the statewide website and, within 5 months, posted directly on the statewide database.

Within one year of FACS Pro implementation, BCAEO was able to extract three reports from the database that were previously submitted by each CAA. The reports included the Weatherization Assistance Program programmatic report, the LIHEAP Crisis Assistance Deliverable Fuel program, and the Community Services Block Grant Information Survey report.

The short term outcome was attained. Upon extracting reports for the first time, BCAEO staff identified some inconsistencies with the reports after sending them to CAAs to review. Some CAAs were not utilizing the system to its fullest capability, therefore reports were not accurate. Additionally, four agencies were identified as not using the system as required by policy for the programs at all. BCAEO determined that this was a need for additional training and the state FACS Pro Super User provided manuals and webinars to provide additional assistance and training for the network.

## X. Conclusions & Recommendations

### Prospects of Attaining Intermediate and Long-Term Outcomes

The Statewide Database project and implementation was well thought out and served as a useful tool for the successful beginning to the statewide database project. The project has successfully reached its short term outcomes of creating a workgroup, choosing a statewide



database to purchase, providing training for the entire Community Action Agency network, and the MDHS-BCAEO eliminating the manual process of submitting three required reports and using the database to pull the required information. Meeting these outcomes has paved the way for the network to identify other databases that they work with and to work toward building a way for information to be shared between the statewide database, FACS Pro, and other required databases. Bridging databases to share information will be a lengthy process but will ultimately lead to less work by agency staff and more efficient services for the customers they serve. By achieving this goal, the network could then reach its long term project goal of having a statewide database that provides data integrity and a better way to serve the low-income individuals living in the state of Michigan.

The statewide database project experienced only a few setbacks throughout implementation stages. Although there were many successes, there were actions identified that would have furthered the project or helped it to proceed more efficiently such as preparing more for push back among the agencies that were against the training and implementation of the database and identifying more than one person in the state to serve as a Super User for the statewide database and sharing the work between the identified staff.

The statewide database project required reporting, monitoring and constant evaluation. The project was monitored throughout to ensure that the identified timeline was in place and that the project was where it was expected to be at any given time. The stakeholders were updated frequently on the progress of the database project and any pending issues or successes. The project manager was continuously evaluating the project to ensure that the outputs were leading to the desired outcome.

### Personal Thoughts

Serving as the project manager at the state level was very beneficial. It provided this researcher with a better understanding of large scale project planning and implementation. The experience provided the researcher with strong leadership skills; strengthen of delegation skills, opened up the opportunity to plan a project with a large group of people and to facilitate the process. The project provided the researcher with a unique opportunity to develop and enhance her community economic development skillset which will be helpful when implementing projects in the future.

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DBA Technologies, LLC  
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phone: 215-918-3320  
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info@dba-techsoft.com

### **ServicePoint**

Bowman Systems  
333 Texas Street, Suite 300  
Shreveport, LA 71101  
Phone: 888.580.3831  
Phone: 318.213.8780  
Fax: 318.213.8784

### **Cap60**

224 5th Street #1840  
New York, New York 10001  
Tel. No.: (917) 668-9174  
Email: sales@cap60.com

### **Application Link Incorporated**

Mike Reed  
4449 Easton Way Blvd, 2nd Floor  
Columbus, Ohio 43219  
614.469.1981 voice  
infoali@applicationlink.com

### **CMTtools**

G R Carey, President  
CMA Technologies  
www.cmatechnologies.com  
800-747-0906 ext 1

### **Adsys tech**

8401 Colesville Road Suite 450  
Silver Spring, MD 20910  
800.ADSYSTK [800.237.9785  
Voice: 301.589.3434  
Fax: 301.589.9254  
info@adsys tech.com

### **Northrup Grumman**

??????????????

Name of Software:		Date:	
Name of Company		Point of Contact:	
City		Telephone Number:	
E-Mail Address			
CATEGORY I: GENERAL BACKGROUND			
RATING CRITERIA		COMMENTS/STRENGTHS/WEAKNESSES	
How long have you been in business			
How many states are currently using your software			
a) List Provided of CAA's using			
Presentation			
Availability of current users-in attendance			
Size of Company			
Company Vision-Mission Statement			
CATEGORY II: GENERAL REPORTING			
RATING CRITERIA		COMMENTS/STRENGTHS/WEAKNESSES	
CSBG-IS Survey			
ROMA			
Internal			
Financial			
Custom Reports for individual CAA's			
Weatherization			
a) 10-71 (Production)			
b) ARRA/Davis-Bacon			
CATEGORY III: SUPPORT/ MAINTENANCE			
RATING CRITERIA		COMMENTS/STRENGTHS/WEAKNESSES	
Ownership-Who Handles Maintenance			
Hosting – Who is Responsible			
Turn Around Time-if system fails			
Security			
a) Type			
b) Who Pays			
c) Who is Responsible			
d) HIPAA Confidentiality			
Ownership of Data			
Updates and Upgrade Policies			
Backup Software System			
Handle of Problems/(Bugs)			



CATEGORY III: SUPPORT/MAINTENANCE – CONTINUED		
Up-to-Date Manual		
Accessibility/Extent of Security Levels		
a) State		
b) Agency		
c) Individual		
CATEGORY IV: TRAINING		
RATING CRITERIA		COMMENTS/STRENGTHS/WEAKNESSES
What if offered		
Is Trainer-Outside Vendor/In-House		
Location of Training		
When will the training take place		
How many people can be trained at one time		
Will all CAA's be trained all at once		
Promptness of Training		
Classroom-style Training		
Follow-up training policy, if needed		
Train-the-Trainer Technique		
CATEGORY V: TECHNICAL STRUCTURE		
RATING CRITERIA		COMMENTS/STRENGTHS/WEAKNESSES
Modules		
a) Weatherization		
b) Head Start		
c) Case Planning		
d) Length of time to develop		
Database Software		
Open Source-able to maintain data/software		
Able to communicate with other databases		
a) Transfer of current data		
Exporting Features		
Can it sustain many users at one time?		
Web Base Software Connected		
a) Web Browsers		
b) Thin Client		
c) Thermal Services		
d) Other		

CATEGORY VI: ADAPTABILITY		COMMENTS/STRENGTHS/WEAKNESSES
RATING - CRITERIA		
Report Builder-Customized		
Adaptability of Individual CAA requests		
Software Import Capabilities from other software programs		
Ease of Adaptability		
a) Database		
b) Queries		
c) Reports		
CATEGORY VII: PROGRAMS		
RATING - CRITERIA		COMMENTS/STRENGTHS/WEAKNESSES
CSBG-To What Extent		
Programs Implemented onto System		
a) ROMA		
b) Weatherization		
c) Headstart/Early Head Start		
d) Homeless		
e) Housing		
f) Aging		
CATEGORY VIII: FISCAL		
RATING - CRITERIA		COMMENTS/STRENGTHS/WEAKNESSES
Overall Cost		
a) One time cost		
b) Startup cost		
c) Monthly Fee		
Yearly Maintenance		
Cost of New Modules		
Cost of Web Base Hosting		
Training Fee		
a) Initial		
b) Follow-up, if needed		
Individual CAA Enhancement		
a) Cost of special customization		
c) Once enhancement has been made-CAA's will have option of obtaining without cost to their Agency		
Updates Costs		
Upgrades Costs		

## DBA TRAINING REGIONS, AGENCIES, DATES and VENUES

**Region 1 First Wave Training: November 8-12**

- Alger-Marquette CAB
- Baraga-Houghton-Keweenaw CAA
- Chippewa-Luce-Mackinac CAA
- Dickinson-Iron CSA
- Gogebic-Ontonagon CAA
- Menominee-Delta-Schoolcraft CAA

Marquette-Nicolet Room  
Northern Michigan University  
9:00 a.m.—4:00 p.m.  
Contact: Pat, 906-227-6338

**Region 2 First Wave Training: November 8-12**

- Mid-Michigan CAA
- Northeast Michigan CSA
- Northwest Michigan CAA

Ramada Inn  
2650 Interstate 75 Business  
Grayling, MI 989-348-7611

**Region 3 First Wave Training: November 29-December 3**

- ACSET CAA
- FiveCAP, Inc.
- Muskegon-Oceana CAP
- Ottawa County CAA

Michigan Alternative & Renewable Energy Center  
Main Seminar Room  
200 Viridian Dr.; Muskegon, MI 49440; 231-722-4371

**Region 4 First Wave Training: November 8-12**

- EIGHTCAP, Inc
- Capital Area Community Services
- Community Action Agency (Jackson, MI)

Michigamme Room  
Kellogg Center  
South Harrison Rd  
Michigan State University  
Phone: 517-432-4000

**Region 5 First Wave Training: November 29-December 3**

- CAA St. Clair County
- Genesee County CARD
- Human Development Commission
- Saginaw County CAC

CAA St. Clair County  
302 Michigan Street  
Port Huron, MI 48060

**Region 6 First Wave Training: October 25-29**

- City of Detroit Department of Human Services
- Macomb County CSA
- Wayne Metropolitan CAA

Laurel Manor Conference Center  
39000 Schoolcraft Road  
Livonia, Michigan 48150  
Phone: (734) 462-0770  
Fax: (734) 462-2080  
Contact: Jennifer

**Region 7 First Wave Training: November 1-5**

- Monroe County Opportunity Program
- Oakland Livingston HSA
- Washtenaw County ET&CSG
- Downriver Community Conference

**Region 8 First Wave Training: November 1-5 (Kalamazoo Valley Community College)**

- Allegan County RDC
- Community Action (Battle Creek, MI)
- Kalamazoo County CAA
- Southwest Michigan CAA

M-TEC: Kalamazoo Valley Community College  
7107 Elm Valley Drive  
Amphitheater A1020 Nov. 1-2; Classroom C1420 Nov. 3-5  
9:00 a.m. -4:00 p.m.  
Continental Breakfast on Nov. 1 Only  
Contact: Lesa 269-373-5066

**December 6-7 Training**

**Wayne Metropolitan CAA (David)**

Louis Piszker, Executive Director  
2121 Biddle, Ste. 102  
Wyandotte, MI 48192  
Phone: (734) 246-2280  
Fax: (734) 246-2288  
Email: [lpiszker@waynemetro.org](mailto:lpiszker@waynemetro.org)

**December 8-9 Training**

**Oakland Livingston Human Service Agency (Roscoe)**

Ronald B. Borngesser, Executive Director  
196 Oakland Ave.  
Pontiac, MI 48348-0598  
Phone: (248) 209-2600  
Fax: (248) -209-2645  
Email: [ronb@olhsa.org](mailto:ronb@olhsa.org)

**Macomb County Community Service Agency (David)**

Frank Taylor, Executive Director  
21885 Dunham Road, Suite 10  
Clinton Township, MI 48036  
Phone: (586) 469-6999  
Fax: (586) 469-5530  
Email: [mccsa@macombcountymi.gov](mailto:mccsa@macombcountymi.gov)

**December 13-14 Training**

**EIGHTCAP, Inc. (Roscoe)**

John Van Nieuwenhuyzen President  
904 Oak Drive, Turk Lake P.O. Box 368  
Greenville, MI 48838  
Phone: (616) 754-9315  
Fax: (616) 754-9310  
Email: [janl@iserv.net](mailto:janl@iserv.net)

**Southwest Michigan CAA (Demarius)**

Arthur C. Fenrick, Executive Director  
185 East Main Street, Ste. 200  
Benton Harbor, MI 49022  
Phone: (269) 925-9077  
Fax: (269) 925-9271  
Email: [afenrick@smcaa.com](mailto:afenrick@smcaa.com)

**December 15-16 Training**

**Kalamazoo County CAA (Roscoe)**

Miguel Rodriguez, Executive Director  
Nazareth Complex Wing 2 - Floor 3  
3299 Gull Road  
Nazareth, MI 49074-0042  
Phone: (269) 373-5066  
Fax: (269) 373-5132  
Email: [mlrodr@kalcountry.com](mailto:mlrodr@kalcountry.com)

**Capital Area Community Services, Inc. (Demarius)**

Ivan W Love, Jr. Executive Director  
101 E. Willow St.  
Lansing, MI 48906  
Phone: (517) 482-6281  
Fax: (517) 482-7747  
Email: [ksnow1327@hotmail.com](mailto:ksnow1327@hotmail.com)

**Mid-Michigan CAA (Tim)**

Jill Sutton, CEO/Executive Director  
1574 E. Washington Rd.  
Farwell, MI 48622  
Phone: (989) 386-3805  
Fax: (989) 386-3277  
Email: [jsutton@mmcaa.org](mailto:jsutton@mmcaa.org)

**January 3-4**

Community Action  
Nancy Macfarlane, CEO  
175 Main St., P.O. Box 1026  
Battle Creek, MI 49016  
Phone: (269) 965-7766  
Fax: (269) 965-1152  
Email: [nancym@caascsm.org](mailto:nancym@caascsm.org)

**January 10-11**

Human Development Commission  
Lori Offenbecher, Executive Director  
429 Montague Ave.  
Caro, MI 48723  
Phone: (989) 673-4121  
Fax: (989) 673-2031  
Email: [lorio@hdc-caro.org](mailto:lorio@hdc-caro.org)

## Statewide Database Purchase

### Total Contract Budget

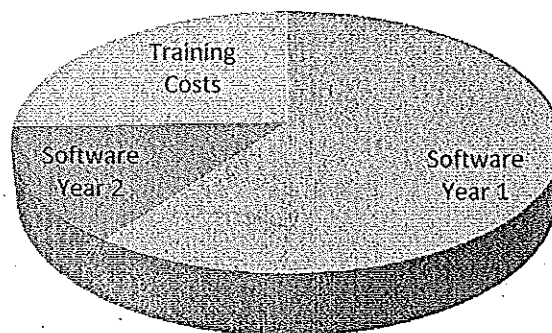
Software Cost	Year 1
Unlimited Users	\$775,000.00
First Year of Hosting	
Software updates	
Technical Support 1 year	
<b>Total</b>	<b>\$775,000.00</b>

Software Cost	Year 2 & 3
Unlimited Users	\$186,000.00
Current Year Hosting	
All updates to the software	
Technical Support	
<b>Total</b>	<b>\$186,000.00</b>

Training Costs	Actual
First Wave	\$330,200.00
Second Wave	
Third Wave	
<b>Total</b>	<b>\$330,200.00</b>

### Actual Cost Breakdown

#### Statewide Database Cost



Amy Dillon  
Statewide Database Project  
Monitoring & Reporting Tracking  
Evaluation

Activities/Indicators	Estimated Start	Estimated Finish	Estimated Days	Actual Start	Actual Finish	Actual Days	Variance (in Days)	Status	Reason for Delay (if necessary)	Alternative Action (if necessary)	Outcome	Evaluation Tool
Identify participants for the workgroup	1-Dec-2009	30-Jan-2010	59	15-Dec-2009	30-Jan-2010	45	(14)	Complete	N/A	N/A	Michigan Community Action Network purchases a statewide database	Contract for database kept by Assodia
Define priorities and needs for which database must possess	1-Feb-2010	28-Feb-2010	27	1-Feb-2010	15-Mar-2010	44	17	Complete	N/A	N/A		
Identify companies that have databases which could meet the needs	1-Mar-2010	30-Mar-2010	29	1-Mar-2010	30-Mar-2010	29	0	Complete	N/A	N/A		
Select a database to purchase	1-Apr-2010	30-Jun-2010	89	1-Apr-2010	31-Aug-2010	1230	1141	Complete	Contract Negotiations	N/A	All CAAs utilizing system for state chosen programs within a year of purchasing the database	Documented by memo to CAAs, contract with chosen company. Utilize information/data/planning from fellow states via email. All documents stored by MCAA.
Create a training plan for all CAA staff including end users, management, and agency database system administrators	1-Aug-2010	31-Aug-2010	30	1-Aug-2010	13-Sep-2010	42	12	Complete	Establish efficient cost saving training plan	N/A		
Create a system of providing additional training and assistance to CAAs for the database	1-Sep-2010	1-Dec-2010	90	15-Aug-2010	31-Dec-2010	136	46	Complete	System needed to be tested and proven	N/A		
Identify key data points that need to be collected for various required federal reporting	1-Dec-2010	1-Feb-2011	60	1-Dec-2010	28-Feb-2011	87	27	Ongoing	Federal reporting requirements change often		Michigan Community Action Network using the new database for all data collection of programs, for eligibility determination of all programs, and to monitor progress of their agency	BCAEO staff will compare current reporting requirements with the data points in the database. BCAEO staff will revise policy to align with the new statewide database ensuring it is being used to the fullest capacity. BCAEO will begin to create reports from the database and store reports in shared drive on network computer.
Create policy requiring use of the database and data entry for the identified programs	1-Feb-2011	28-Feb-2011	27	1-Feb-2011	1-Jun-2011	120	93	Ongoing	Verify Accuracy and give appropriate review time			
State begins to pull reports rather than CAAs having to pull data and submit	1-Jul-2011	1-Apr-2013	630	1-Oct-2011	1-Apr-2013	540	(90)	Ongoing	State continues to make reporting easier for CAAs			
<b>TOTAL</b>			<b>1,041</b>			<b>2,273</b>	<b>1,232</b>					

Jul-13

### Narrative

Defining the priorities for the database and identifying necessary pieces that needed to be included in the database took longer than originally planned. The process was important and needed to have the additional time to ensure that all current programs and data points were identified, the correlation between the data points and many systems, and how to incorporate those into the chosen database. Once identifying all of the different data collection programs for all of the different programs offered, a lot more time was necessary. There were many lessons learned along the way when meeting milestones. All players involved in the project have learned valuable lessons from the project and timeline. CAA staff had a first hand look at how many actual different required systems, purchased databases, and internal databases were being used to collect and track customers, demographics, and services. By listing all of the programs and identifying the pros and cons to each, the necessary items for the program as opposed to the convenience of the known vs. the unknown was a real eye opener for those participating and provided a more clear reasoning as to why the database was needed. The lesson learned by the CAA Directors was similar. I think by receiving feedback from the end users that participated on the work group they could see some reasoning behind the purchase of the database. Also, with the constant change and updates with funders, it was clear that a system with some validity that could house all programs and data was an advantage for the agency and securing future funding. The Michigan Community Action Agency learned a lot as well. The lessons included a better understanding of what the state is trying to accomplish and the federal expectations that come with accepting the federal funding. They also saw first hand the struggles across CAAs in Michigan to meet these reporting requirements by using internally created databases and spreadsheets. The State CSBG office was also able to see the struggles faced and expectations set for the CAAs and how they are trying to meet all of the obligations with limited resources. The process allowed everyone to see things from each others point of view and understand the importance of the process.

08/11/2013

The database project, to this point, has maintained the same priorities outcomes. The project is now in the final stages of policy changes in order to comply with the federal reporting and to ensure proper use and uniform use of the database for all agencies. Policy changes continue to occur but they are based on federal grants such as the Community Services Block Grant policy and planning which is currently undergoing change. New Organizational Standards have been released along with Results Oriented Management and Responsibility changes that are being implemented. So the policy updates have halted until these new standards and expectations are official and the changes can be incorporated into policy.

08/25/2013

The database project continues to be an ongoing project. At this point in the project, responsibilities are starting to change in terms of the role the State Office project manager has with the project. The project has successfully been rolled out to all agencies and each agency has 1-2 designated System Administrators which serve as the internal help desk for their agency. The role of the help desk has now been handed over to the State Association, although the State office does assist from time to time. There are discussions of enhancing the system to align with the new federal standards and the changes with the ROMA Next Generation work group which is working to identify and change national performance indicators to tell a better story for Community Action. Those changes will be implemented into the database as needed.

# **Michigan Community Action Agency Association**

## **Request for Information Client Tracking Data Base Software**



**RFI Release Date: March 29, 2010**

**RFI Due Date: April 30, 2010  
(by 5:00 p.m E.D.T.)**



## MCAAA Letterhead

March 29, 2010

Prospective Vendor:

The Michigan Community Action Agency (MCAAA) is a membership organization for the thirty (30) Community Action Agencies (CAA's), which provide multiple human service programs in all eighty-three (83) counties throughout the State of Michigan. For more than 30 years, the members of MCAAA have served as advocates for low-income individual and families. Our purpose is to support community action and human service agencies through which low-income individuals and families may achieve greater financial and personal independence through the programs they offer, such as Head Start, Weatherization, Senior Citizens services, and Employment and Training Programs. Michigan CAA's are the largest human service network outside of state government. We are committed to broadening economic self-sufficiency through human service programs.

On behalf of all the Community Action Agencies, the MCAAA is seeking a qualified company who demonstrates the financial ability, resources, skills, capability, willingness, and business integrity necessary to implement a client tracking data base that meets our needs. Our process includes the completion and submittal of the attached Request for Information. Based upon a favorable response to the Request for Information, your Company must make a face-to-face presentation on your product to a group of Community Action employees and Michigan Department of Human Services staff. Timeframes for facilitating this initiative is attached in the Request for Information (RFI).

This project should be a Turnkey Proposal, insomuch that we expect the successful company to be responsible for the complete implementation of this project. The project should include the following which is NOT all inclusive and any other recommendations by your company should be communicated:

1. Hosting the software with SSL (Secure Sockets Layer) protocols;
2. Provide complete training of such software to our association which should include the initial setup, individual agencies personnel and any follow-up training;
3. Each Agency Data is to be confidential and complying with the federal law "Health Insurance Portability and Accountability Act of 1996 (HIPAA) Privacy and Security Rules" which protects the privacy of individually identifiable health information; the HIPAA Security Rule, which sets national standards for the security of electronic protected health information; and the confidentiality provisions of the Patient Safety Rule, which protect identifiable information being used to analyze patient safety events and improve patient safety; and
4. Each Agency should be allowed to add additional personnel to the system locally.

Here is the hypothetical environment we wish for you to consider for your presentation:

- The area will include the entire state of Michigan;
- There will be thirty (30) individual agencies using the software on a daily basis;
- Each agency may have as many as (10) satellite offices in their area;
- Each offices may have up to ten (10) employees entering client data at any given moment;
- Based on thirty (30) agencies with the possibility ten (10) satellite offices and ten (10) employees in each office, the total of an estimated three-thousand (3,000) data entry personnel may be on the web-based software at any given time;
- We expect the performance of the software to be the same if one employee or three-thousand (3000) employees are performing their duties; and
- We expect the software performance to be efficient and FAST.

In the event you find your company is willing to make a face-to-face presentation for this proposal please indicate dates and time for such a presentation within the next 30 days.

Please send or drop off your Request for Information to:

**"Tracking Data Base Response to RFI"**  
**Jim Crisp, Executive Director**  
**Michigan Community Action Agency Association**  
**Office Park West, 516 S. Creyts Road Suite A**  
**Lansing, MI 48917**

**(Instructions for delivery: MAIL OR DELIVER one (1) signed ORIGINAL and ten (10) paper copies)**

We hope your company will respond to this important initiative.

Sincerely,

Jim Crisp  
Executive Director

## ***Client Tracking Data Base Software***

### **Introduction**

This is a Request for Information (RFI) only and does not constitute a commitment, implied or otherwise, that the Michigan Community Action Agency Association herein referred to as "MCAAA" will take procurement action in this matter. Further, MCAAA will not be responsible for any cost incurred in furnishing this Information. This RFI is being used to gather market research for MCAAA to make decisions regarding development of a client tracking data base system for Community Action Agencies across the state of Michigan and for the weatherization services provided by one Limited Purpose Organization. MCAAA will use the results of this RFI to determine interest that may lead to selection of a specific company to implement a client tracking data base in Michigan.

### **Statement of Need**

MCAAA is requesting proposals from qualified vendors to implement a comprehensive interface solution for Michigan's 30 Community Action Agencies and one Limited Purpose Organization that provides weatherization services. The interface solution is expected to be a combination of licensed software and a custom interface engine between the base software system and multiple state, federal, and private systems. The proposed solution should follow a model utilizing a web-based system. However, MCAAA is seeking recommendations/options regarding the utilization of a centrally maintained application and data server/and/or locally maintained server. Describe advantages of each and how it would benefit programmatically and/or cost efficiencies.

### **MICHIGAN COMMUNITY ACTION AGENCIES OVERVIEW**

MCAAA is a membership organization for the 30 Community Action Agencies (CAAs), which provide multiple human service programs in all eighty-three (83) counties throughout the State of Michigan. For more than thirty (30) years, the members of MCAAA have served as advocates for low-income individual and families. Our purpose is to support community action and human service agencies through which low-income individuals and families may achieve greater financial and personal independence through the programs they offer, such as Head Start, Weatherization, Senior Services, and Employment and Training Programs. Michigan CAAs are the largest human service network outside of state government. We are committed to broadening economic self-sufficiency through human service programs.

While each of Michigan's 30 CAA's operate independently, they all offer similar programs to low income families and individuals in the following eight broad areas:

- Securing and maintaining employment; overcoming barriers to employment;
- Securing safe, affordable housing;
- Securing training, education, and child development opportunities;
- Providing utility assistance and weatherization services to reduce energy bills;
- Improving nutrition and access to food;
- Achieving better income management;
- Creating linkages with other human services programs; and
- Achieving self-sufficiency.

Community Action Agencies help the most vulnerable citizens gain hope that their lives and the lives of their family can be improved. In FY 2007, CAAs assisted 473,013 Michigan residents, including 221,854 families, in one or more of the above areas.

A list of the Michigan Community action Agencies is as follows:

ACSET Community Action Agency Beverly Drake, Executive Director 1550 Leonard N.E. Grand Rapids, MI 49505 Phone: (616) 336-4100 Fax: (616) 336-4118 Email: <a href="mailto:bdrake@acset.org">bdrake@acset.org</a>	Alger-Marquette CAB Earl P. Hawn, Jr., Executive Director 1125 Commerce Drive Marquette, MI 49855-8630 Phone: (906) 228-6522 Fax: (906) 228-6527 Email: <a href="mailto:ehawn@amcab.org">ehawn@amcab.org</a>	Allegan County RDC Edward Hillary, Executive Director 323 Water St. Allegan, MI 49010 Phone: (269) 673-5472 Fax: (269) 673-3795 Email: <a href="mailto:ehillary@acrdc.org">ehillary@acrdc.org</a>
Baraga-Houghton-Keweenaw CAA Jean La Berge, Executive Director 926 Dodge Street Houghton, MI 49931 Phone: (906) 482-5528 Fax: (906) 482-5512 Email: <a href="mailto:phkcaa@att.net">phkcaa@att.net</a>	Community Action Nancy Macfarlane, CEO 175 Main St., P.O. Box 1026 Battle Creek, MI 49016 Phone: (269) 965-7766 Fax: (269) 965-1152 Email: <a href="mailto:nancym@caascsm.org">nancym@caascsm.org</a>	Capital Area Community Services, Inc. Ivan W Love, Jr., Executive Director 101 E. Willow St. Lansing, MI 48906 Phone: (517) 482-6281 Fax: (517) 482-7747 Email: <a href="mailto:ksnow1327@hotmail.com">ksnow1327@hotmail.com</a>
Chippewa-Luce-Mackinac CAHRA Ronald J. Calery, Executive Director 524 Ashmun, P.O. Box 70 Sault Ste. Marie, MI 49783 Phone: (906) 632-3363 Fax: (906) 632-4255 Email: <a href="mailto:execdtr@clmcaa.com">execdtr@clmcaa.com</a>	Community Action Agency Marsha Kreucher, Executive Director 1214 Greenwood Ave. Jackson, MI 49203 Phone: (517) 784-4800 Fax: (517) 784-6815 Email: <a href="mailto:mkreucher@caailh.org">mkreucher@caailh.org</a>	DHS - City of Detroit Shenetta L. Coleman, Executive Director 5031 Grandy St. Detroit, MI 48211 Phone: (313) 852-5628 Fax: (313) 852-4837 Email: <a href="mailto:ColemaS@dhs.ci.detroit.mi.us">ColemaS@dhs.ci.detroit.mi.us</a>
Dickinson-Iron Community Service Agency Jeffrey Heino, Executive Director 800 Crystal Lake Blvd., Suite 104 Iron Mountain, MI 49801 Phone: (906) 774-2256 Fax: (906) 774-2257 Email: <a href="mailto:jheino@dicsami.org">jheino@dicsami.org</a>	CAA St. Clair County Melinda K. Johnson, CCAP Executive Director 302 Michigan Street Port Huron, MI 48060 Phone: (810) 982-8541 Fax: (810) 982-7233 Email: <a href="mailto:johnson.melinda@caascc.org">johnson.melinda@caascc.org</a>	EIGHTCAP, Inc. John Van Nieuwenhuyzen, President 904 Oak Drive Greenville, MI 48838-8230 Phone: (616) 754-9315 Fax: (616) 754-9310 Email: <a href="mailto:johnvan@8cap.org">johnvan@8cap.org</a>
FiveCAP, Inc. Mary L. Trucks, Executive Director 302 N. Main St., P.O. Box 37 Scottville, MI 49454 Phone: (231) 757-3785 Fax: (231) 757-9669 Email: <a href="mailto:fivecap@fivecap.org">fivecap@fivecap.org</a>	Genesee County CARD Steve Walker, Executive Director 601 N. Saginaw St., Suite 1B Flint, MI 48502-2009 Phone: (810) 232-2185 Fax: (810) 768-4667 Email: <a href="mailto:swalker@co.genesee.mi.us">swalker@co.genesee.mi.us</a>	Gogebic-Ontonagon CAA Carolynne Carlson, Executive Director 100 Mill Street Bessemer, MI 49938 Phone 1-906-667-0283 Fax #: 1-906-663-4810 Email: <a href="mailto:carlsonc@gocaa.org">carlsonc@gocaa.org</a>

<p>Human Development Commission Lori Offenbecher, Executive Director 429 Montague Ave. Caro, MI 48723 Phone: (989) 673-4121 Fax: (989) 673-2031 Email: <a href="mailto:mav@hdc-caro.org">mav@hdc-caro.org</a></p>	<p>Kalamazoo County CAA Miguel Rodriguez, Executive Director Nazareth Complex Wing 2 - Floor 3 3299 Gull Road Nazareth, MI 49074-0042 Phone: (269) 373-5066 Fax: (269) 373-5132 Email: <a href="mailto:mlrodr@kalcounty.com">mlrodr@kalcounty.com</a></p>	<p>Macomb County CSA Frank Taylor, Executive Director 21885 Dunham Road, Suite 10 Clinton Township, MI 48036 Phone: (586) 469-6999 Fax: (586) 469-5530 Email: <a href="mailto:mccsa@macombcountymi.gov">mccsa@macombcountymi.gov</a></p>
<p>Menominee-Delta-Schoolcraft CAA William Dubord, Executive Director 507 First Avenue North Escanaba, MI 49829 Phone: (906) 786-7080 Fax: (906) 786-9423 Email: <a href="mailto:bdubord@mdscaa.org">bdubord@mdscaa.org</a></p>	<p>Mid-Michigan CAA Jill Sutton, CEO/Executive Director 1574 E. Washington Rd. Farwell, MI 48622 Phone: (989) 386-3805 Fax: (989) 386-3277 Email: <a href="mailto:jsutton@mmcaa.org">jsutton@mmcaa.org</a></p>	<p>Monroe County Opportunity Program Stephanie Zorn Kasprzak, Executive Director 1140 South Telegraph Road Monroe, MI 48161 Phone: (734) 241-2775 Fax: (734) 457-0630 Email: <a href="mailto:skasprzak@monroecountyop.org">skasprzak@monroecountyop.org</a></p>
<p>Muskegon-Oceana CAP Ken Shelton, Executive Director 1170 W. southern Ave. Muskegon, MI 49411-2241 Phone: (231) 725-9499 Fax: (231) 722-1959 Email: <a href="mailto:Krsheltonsr@aol.com">Krsheltonsr@aol.com</a></p>	<p>Northeast Michigan CSA John Swise, Chief Executive Officer 2375 Gordon Road Alpena, MI 49707 Phone: (989) 356-3474 Fax: (989) 354-5909 Email: <a href="mailto:SwiseJ@nemcsa.org">SwiseJ@nemcsa.org</a></p>	<p>Northwest Michigan CAA John K. Stephenson, Executive Director 3963 Three Mile Road Traverse City, MI 49686 Phone: (231) 947-3780 Fax: (231) 947-4935 Email: <a href="mailto:jstephenson@nmcaa.net">jstephenson@nmcaa.net</a></p>
<p>Oakland Livingston Human Service Agency Ronald B. Borngesser, Executive Director 196 Oakland Ave. Pontiac, MI 48348-0598 Phone: (248) 209-2600 Fax: (248) -209-2645 Email: <a href="mailto:ronb@olhsa.org">ronb@olhsa.org</a></p>	<p>Ottawa County CAA William Raymond ("Bill"), Executive Director 12251 James St. Suite 300 Holland, MI 49424-9661 Phone: (616) 393-4433 Fax: (616) 393-5612 Email: <a href="mailto:braymond@miottawa.org">braymond@miottawa.org</a></p>	<p>Saginaw County CAC Lillie L. Williams, Executive Director 2824 Perkins Saginaw, MI 48601 Phone: (989) 753-7741 Fax: (989) 753-2439 Email: <a href="mailto:lwilliams@saginawcac.org">lwilliams@saginawcac.org</a></p>
<p>Southwest Michigan CAA Arthur C. Fenrick, Executive Director 185 East Main Street, Ste. 200 Benton Harbor, MI 49022 Phone: (269) 925-9077 Fax: (269) 925-9271 Email: <a href="mailto:contact@smcaa.com">contact@smcaa.com</a></p>	<p>Washtenaw County ET &amp; CSG Trenda Rusher, Executive Director 301 W. Michigan Ave., Ste. 400 Ypsilanti, MI 48197 Phone: (734) 544-3053 Fax: (734) 544-6730 Email: <a href="mailto:rushert@ewashtenaw.org">rushert@ewashtenaw.org</a></p>	<p>Wayne Metropolitan CAA Louis Piszker, Executive Director 2121 Biddle, Ste. 102 Wyandotte, MI 48192 Phone: (734) 246-2280 Fax: (734) 246-2288 Email: <a href="mailto:lpiszker@waynemetro.org">lpiszker@waynemetro.org</a></p>

**Note:** One Limited Purpose Organization called Downriver Community Conference, receives funding from the Michigan Department of Human Services for weatherization services only. The proposed system would include this Agency's weatherization services.

### **Responding to this Request for Information**

MCAAA is requesting a response to the following information:

- Complete Attachment A, B and C;
- Provide a brief summary (300 word limit) description of previous relevant experience in developing/implementing a client tracking data base system for Community Action Agencies. The proposed solution is expected to provide the following benefits:
  1. Single entry of client demographic data and client profile information;
    - Licensing of a base software system to enter and store client demographic profile information;
    - Gather and store Demographic and Household Information as a Client Profile;
    - Determine Basic Program Eligibility (capture enough information to determine which programs a client might be eligible);
    - Embedded client consent audit tracking for sharing of private data gathered from clients (in order to avoid other privacy consent actions);
    - Program participation tracking to identify and store information about the programs which the client is participating;
    - Describe how your software system complies with government and industry standards such as HIPPA laws, and all relevant Federal Standards for use of Social Security number etc.
  2. Single interface to multiple systems;
    - Building a custom middleware engine to interface between interface solution and other agency systems such as but not limited to:
      - Case Management;
      - Head Start - (Child Plus);
      - Weatherization module with interface to the program's audit tool
      - Senior Services (Nutrition and Chore-sharkbyte);
      - Transit programs;
      - WIC (supplemental nutrition program);
      - Custom modules (Include options for building custom modules)
  3. Eased reporting, both standard and customized by an individual Community Action Agency;
    - A robust reporting engine and tool to allow for future reporting interfaces and consolidation of client, agency, and state reports.
  4. Custom Interfaces with separate fiscal systems.
    - This may be a single interface implemented in different ways, or may be individual interfaces to transfer financial and aggregate data into fiscal systems;
    - The fiscal systems are located at each of the various local community action agencies and are not web-based systems;
    - Ability to work with Community Action Agencies on an individual basis.
  5. Improved security and embedded consent to share information between program entities;
  6. Reduced hardware requirements and improved support;
  7. Updated platform architecture providing flexible computing environment for the future; and

8. Increased client service capability through the use of client profiles, integrated referrals and ad hoc reporting. Reports at a minimum must include:
  - CSBG IS;
  - System should have capacity to create and track custom program activity fields at the client level. In addition, some agency-level information will need to be entered into the system, and merged with aggregate client-level data for reporting purposes.
  - It is likely that individual agencies or MCAAA will come back to the Respondent to purchase or build additional modules and/or, agency specific, custom interfaces. Additionally, there are a number of other systems with which MCAAA would like to potentially interface. Please include in your responses how you propose to fulfill this requirement and explain how your proposed software solution will facilitate rapid interface and custom module development.
9. Provide information on how initial and ongoing staff training and support would occur; and
10. Provide information on how individual Community Action Agency data will be transferred to the new data system.

Although all comments received will be carefully reviewed and considered for inclusion in any possible later action, the initiators of this request make no commitment to include any particular recommendations. Respondents will not be notified of the results of the review.

Provide a customer reference list of no fewer than three (3) organizations of a size and scope similar to Michigan Community Action Agencies with whom Respondent currently has contracts and/or has previously provided similar goods and/or services within the past five (5) years. Reference list is to include company name, contact person, telephone number and e-mail address, project description, length of business relationship and background of the project (including the year of project, summary of work performed, and any other relevant information).

#### **Qualifications**

A Prospective Vendor who is selected for a demonstration will be Respondent(s) whose proposal is most advantageous to MCAAA. MCAAA is not bound to accept the lowest priced proposal if that proposal is not in the best interests of the Community Action Agencies as determined by MCAAA in its sole discretion. Respondents must provide the following in order to qualify for this project:

- Documented, relevant qualifications, experience, and references;
- Financial stability and capacity to perform; and
- Costs of respondent's response is both affordable and cost effective for the agencies to implement and maintain.

#### **Selection of Expert**

Upon meeting the qualifications above, proposals will be evaluated on the following criteria:

- Degree to which vendor's proposal fulfills (1) scope of work, (2) specifications, and (3) MCAAA terms and conditions;
- Degree to which respondent's response provides a compelling long-term solution and viable relationship with individual Community Action Agencies; and
- Participation in and support of Community Action Agency information systems, including additional software modules available.

## INSTRUCTIONS FOR SUBMISSION

### Number and Description of Original Copies

Mail or deliver the number of response sets specified on the Title Page. All documents should be 8 1/2" x 11". The copies should be bound in a manner that facilitates easy handling and reading by the evaluation committee. The original and the copies must read exactly the same. The original must remain unbound in order to facilitate the ease of creating additional copies as may be needed.

### Late Submission

Responses received by MCAAA after the Submittal Date and Time indicated on the Title Page **WILL NOT** be considered. The Respondent assumes the risk of the method of dispatch chosen. Postmarking by the Submittal Date and Time shall not substitute for actual proposal receipt.



### **SUBMITTAL DATE AND TIME**

RESPONSES MUST BE RECEIVED NO LATER THAN:

**FRIDAY, APRIL 30, 2010 3:00 PM**

Michigan time (Eastern time zone) per the time clock at MCAAA)

**Late responses will not be considered**

### **MAIL INSTRUCTIONS**

Submit responses in a sealed envelope or package with the Respondent's name, address and the title clearly marked on the outside of each sealed envelope or package:

**"Response to RFI Client Tracking Data Base"**

**MAIL OR DELIVER one (1) signed ORIGINAL and ten (10) paper copies of your proposal to:**

**Jim Crisp, Executive Director**

Michigan Community Action Agency Association

Office Park West, 516 S. Creyts Road Suite A

Lansing, MI 48917

**Do not submit copies to any other location**

### **CONTACT FOR RFI INQUIRIES**

**Jim Crisp, Executive Director**

Michigan Community Action Agency Association

Office Park West, 516 S. Creyts Road Suite A

Lansing, MI 48917

Phone: 517.321.7500

Email: [jcrisp@mcaaa.org](mailto:jcrisp@mcaaa.org)

*The person designated above shall be the only contact for all inquiries regarding any aspect of this Request for Information (RFI) and its requirements. DO NOT CONTACT ANY OTHER MCAAA EMPLOYEE, REPRESENTATIVE, OR COMMUNITY ACTION AGENCY REGARDING THIS RFI UNLESS SPECIFICALLY INDICATED OTHERWISE IN THIS RFI OR INSTRUCTED TO DO SO IN WRITING BY THE PERSON DESIGNATED ABOVE.*

### **Time for Response**

#### **EVENT**

RFI Released

Questions submitted to [jcrisp@mcaaa.org](mailto:jcrisp@mcaaa.org)

Responses due

Respondent Presentations

MCAAA/CAA Director's Approval

Anticipated date of award

#### **DATE**

March 29, 2010

April 9, 2010

April 30, 2010, 3 pm (EDT)

May 10-21, 2010

June 11, 2010

June 25, 2010

*Be advised that these dates are subject to change as MCAAA deems necessary.*

## ATTACHMENT A – SIGNATURE SHEET

**Respondent Name:**

(Please type or print name of company)

**Legal Street Address:**

**City:**

**State:**

**Zip:**

**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **E-Mail:** \_\_\_\_\_

I certify that I am a duly authorized representative of the Respondent listed above. MCAAA is hereby authorized to request from any individual or company any information it deems necessary to verify any information provided by Respondent in its proposal and to determine the capacity and responsibility of Respondent as a prospective contractor.

**Signature:**

(Must be signed in full in ink by an officer of your company)

**Name:**

(please type or print)

**Title:**

(please type or print)

**Date:**

## ATTACHMENT B - RESPONDENT PROFILE AND EXECUTIVE SUMMARY

### Company Profile — (Attach additional pages if necessary).

1. Type of Operation: Individual: \_\_\_\_ Partnership: \_\_\_\_ Corporation: \_\_\_\_ Government: \_\_\_\_
2. Geographical area of operation for your company: \_\_\_\_\_
3. Number of years in business related to this RFI: \_\_\_\_\_
4. Number of employees dedicated to fulfillment of this contract: \_\_\_\_\_
5. Company-wide Annual Sales Volume: \_\_\_\_\_
6. State that you will provide a copy of your financial statements for the past two (2) years, if requested by MCAAA.

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7. Is Respondent currently for sale or involved in any transaction to expand or to become acquired by another business entity?  
If yes, please explain the impact both in organizational and directional terms.      Yes      No

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8. Provide any details of all past or pending litigation or claims filed against Respondent that would affect Respondent's performance.

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9. Is Respondent currently in default on any loan agreement or financing agreement with any bank, financial institute, or other entity?  
If yes, specify date(s), details, circumstances, and prospects for resolution.      Yes      No

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10. Does any current relationship whether a relative, business associate, capital funding agreement or any other such kinship exist between Respondent and any MCAA or Community Action Agency, employee?

If yes, please explain relationship

Yes

No

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12. Are there any circumstances impacting Respondent that could affect Respondent's ability to perform under any award made through RFI process.?

If yes, please explain relationship

☐

Yes

☐

No

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### Service and Support

1. Describe your company's service/support philosophy, how it is carried out, and how success is measured.

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2. Describe your company's quality assurance program, its requirements and how are they measured.

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## **ATTACHMENT C - REFERENCES**

Provide a customer reference list of no fewer than three (3) organizations of a size and scope similar to Michigan Community Action Agencies with whom Respondent currently has contracts and/or has previously provided similar goods and/or services within the past five (5) years. Reference list is to include company name, contact person, telephone number and e-mail address, project description, length of business relationship and background of the project (including the year of project, summary of work performed, and any other relevant information).

# Michigan Community Action Agency Association

## Request for Proposal

### *Client Information Software*

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#### INQUIRIES AND PROPOSALS SHOULD BE DIRECTED TO:

Name: James E. Crisp  
Title: Executive Director  
Entity: Michigan Community Action Agency Association  
Address: 516 S. Creyts Rd., Ste. A  
Lansing, MI 48917  
Phone: (517) 321-7500  
Fax: (517) 321-7504  
Email: [jcrisp@mcaaa.org](mailto:jcrisp@mcaaa.org)

## **I. GENERAL INFORMATION**

### **A. Purpose**

This Request for Proposal (RFP) is for the purchase of client information tracking software. Detailed proposal specifications are listed in Section II.

### **B. Description of Entity**

The Michigan Community Action Agency Association (MCAAA) is a statewide membership organization for Michigan's Community Action Agencies (CAAs). MCAAA offers a variety of programs which support the work of CAAs and are designed to enhance their effectiveness.

CAAs play an important role in economic development through their programs, including collaborating with other agencies for greater impact. While each of MI's CAAs operate independently, they all offer similar programs to low-income families and individuals in the following eight broad areas:

- Securing, maintaining, and overcoming barriers to employment.
- Securing safe, affordable housing.
- Securing training, education, and child development
- Providing energy assistance and energy efficiency services.
- Improving nutrition and access to food.
- Achieving better money management.
- Creating linkages with other human services programs.
- Achieving self-sufficiency.

### **C. Who May Respond**

Only experienced software vendors or resellers may respond to this RFP.

### **D. Instructions on Proposal Submission**

#### **1. Closing Submission Date**

Proposals must be submitted no later than 5 p.m. on Monday, July 19, 2010.

#### **2. Inquiries**

Inquiries concerning this RFP should be directed to James E. Crisp at [jcrisp@mcaaa.org](mailto:jcrisp@mcaaa.org) or (517) 321-7500.

3. Conditions of Proposal

All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Offeror and will not be reimbursed by MCAAA.

4. Instructions to Potential Bidders

Your proposal may be submitted by mail, fax or email to:

Name: James E. Crisp  
Title: Executive Director  
Entity: MCAAA  
Address: 516 S. Creyts Rd., Ste. A  
Lansing, MI 48917  
Fax: (517) 321-7504  
Email: jcrisp@mcaaa.org

It is the responsibility of the Offeror to ensure that the proposal is received by MCAAA by the date and time specified above. Late proposals will not be considered.

5. Right to Reject

MCAAA reserves the right to reject any and all proposals received in response to this RFP.

6. Small Businesses, Minority Owned Firms, and Women's Business Enterprises

Efforts will be made by MCAAA to utilize small businesses, minority owned firms and women's business enterprises.

7. Notification of Award

It is expected that a decision selecting the successful bidder will be made by July 29, 2010. The chosen applicant will be notified during the following week.

**II. SPECIFICATION SCHEDULE**

**A. Goods or Services Required**

The purpose of this RFP is to obtain costing information for client information software that will be used to track community action agency client information. The software will be used by CAAs around the state to track client income, eligibility, and other relevant information. The following information should be included with each proposal:



- Description of available modules;
- Software demo and sample reports;
- Listing of hardware specifications;
- Listing of network requirements;
- General software information such as age of software, number of U.S. users, and how often the software is updated.
- Description of customer support that is available including average response time.
- Is there a 60 or 90-day guarantee?
- Information regarding the system security such as password requirements and the ability to assign access by user.
- Describe the report writer.
- Does the software have data import/export capabilities?
- Describe the implementation process and on-site training that will be provided.

**B. Delivery Schedule**

The software shall be delivered on a date agreed upon by the successful bidder and MCAAA.

**C. Price**

The Offeror's proposed price along with information indicating how the price was determined should be submitted. The price should include a breakdown of the following elements: cost of each module, staff training, and technical support.

**III. OFFEROR'S TECHNICAL QUALIFICATIONS**

**A. Prior Experience**

The Offeror should describe its prior experience including the names, addresses, contact persons, and telephone numbers of prior organizations serviced.

**B. Organization, Size, and Structure**

The Offeror should describe its organization, size, and structure. Indicate, if appropriate, if the firm is a small or minority-owned business.

**C. Qualifications**

The Offeror should describe the qualifications of any individuals who may be assigned to this contract. Education, position in firm, years and types of experience, etc. will be considered.

**D. Understanding of Needs**

The Offeror should describe its understanding of the needs of MCAAA and any other pertinent information.

**IV. PROPOSAL EVALUATION**

**A. Nonresponsive Proposals**

Proposals may be judged nonresponsive and removed from further consideration if any of the following occur:

1. The proposal is not received timely in accordance with the terms of this RFP.
2. The proposal does not follow the specified format.

**B. Evaluation**

Evaluation of each proposal will be based on the following criteria:

<b>Factors</b>	<b>Point Range</b>
Ease of Use	0-40
Meets Technical Requirements	0-40
Offeror's Qualifications	0-10
Price	0-10
MAXIMUM POINTS	100

**C. Review Process**

MCAAA may, at its discretion, request presentations by or meetings with any or all Offerors to clarify or negotiate modifications to the Offerors' proposals.

However, MCAAA reserves the right to enter into a contract without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, which the Offeror can propose. MCAAA contemplates award of this bid to the responsible Offeror with the highest total points.

Should all costs come in over our budget amount, MCAAA at its sole discretion may enter into negotiations with one or more otherwise acceptable vendors.