

REQUEST FOR PROPOSAL

For

CaliforniaVolunteers, Application Development

RFP #CV18-106

November 2, 2018

State of California
CaliforniaVolunteers
1400 10th Street, 2nd Floor
Sacramento, CA 95814

Written Proposals Due to
CaliforniaVolunteers
No Later Than:
5:00 p.m. on Wednesday, November 14, 2018

Email to Kaitlin Meyer
Kaitlin.Meyer@californiavolunteers.ca.gov

Exhibit A
Scope of Work

CaliforniaVolunteers, Application Development

BACKGROUND

CaliforniaVolunteers (CV), Office of the Governor, addresses community and state challenges by investing in effective service solutions, while leveraging public, private, and nonprofit partnerships and resources. Through AmeriCorps, Disaster Volunteering, and Volunteer Action, CaliforniaVolunteers transforms small investments into big community impact. Detailed information regarding CaliforniaVolunteers' mission and programming is available at www.CaliforniaVolunteers.ca.gov.

Karen Baker, State of California Chief Service Officer, leads the organization in consultation with a 25-member Commission appointed by the Governor. The Commission supports the mission and objectives of CaliforniaVolunteers and fulfills statutory responsibilities.

CaliforniaVolunteers has received federal funding from the Corporation for National and Community Service through the Volunteer Generation Fund (VGF) Grant to support this project.

PURPOSE OF SCOPE

The purpose of this scope of work is to identify a contractor who can develop a comprehensive, personalized, and user-friendly volunteer- and service-oriented opportunity and tracking platform that can be accessed as a web-based system (linked to a current website) and a mobile application available to all Californians regardless of cellphone system and provider. This system would showcase volunteer and other service opportunities (e.g. AmeriCorps positions).

SCOPE OF WORK

1. Contractor agrees to provide CaliforniaVolunteers, Office of the Governor with the creation of a volunteer opportunity tracking platform that is both web-based and a mobile application as described herein:

As more Californians utilize mobile technology in their day-to-day life, CaliforniaVolunteers seeks to build a web-based and mobile application platform to provide as well as track volunteer opportunities. Through the creation of a comprehensive, personalized, and user-friendly platform, California will be able to provide a volunteer- and service-oriented marketplace to all Californians – regardless of age, socioeconomic status, or education – across the state.

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2. The services shall be performed at various locations, dependent on location of the contractor and potential travel (as determined by CaliforniaVolunteers).
3. The services shall be provided during regular work hours; however, the contractor may be expected to travel and work outside of these hours depending on the project timeline and needs of CaliforniaVolunteers. This will be determined in further conversations between CaliforniaVolunteers and the contractor.
4. Detailed description of work to be performed and duties of all parties. Address the following issues as applicable:
 - **Web-Based and Mobile Application Platform Structure and User/Platform Interface: *please speak to the following questions and address the key requirements mentioned.***
 - How will your platform handle reservations (confirmation, logistics, and cancellations) and describe your operational workflow for each user of this platform?
 - Address the ability of the platform to be accessed on both a web-based system as well as a mobile application offered in application stores (e.g. iTunes, Google) and on various devices (e.g. different phone types, laptops and desktops, web browsers).
 - Describe the capacity for the contractor/contracting company to hold all elements related to the platform on their server.
 - Would the platform provide unlimited administrative access to post/remove volunteer positions?
 - Address the ability to post recurring volunteer opportunities/set recurrence.
 - Describe in detail whether the platform will have a scalable technology system that can connect with large groups of people at once and in areas with limited phone and internet service.
 - Describe the technology language that will be used to develop the mobile application for multiple devices.
 - Describe the functionality that will be available to users when utilizing this platform in the field. How will users be leveraged in a moment of action (e.g. disasters, events, service days and projects, etc.)?
 - What will be the process of embedding the platform into any destination (e.g. website, microsite, etc.)?
 - **Data Collection Processes and User Security: *please speak to the following questions and address the key requirements mentioned.***

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- What data will your system capture about the performance of volunteer activities and how will CaliforniaVolunteers be able to access the collected data?
 - What factors influence the accuracy of all reported volunteer opportunity and tracking data?
 - What security mechanisms are in place to ensure the privacy of volunteer information? What volunteer disclaimers will be included on the mobile and web-based platform?
 - What effort is taken to anonymize users and disassociate user's identifiable information?
 - What is your take/your company's take on user privacy? What standards do you conform to?
 - What is the process for capturing action data about volunteerism and what permissions would be included for the use of data by other entities not directly involved with the user (e.g. schools, companies, etc.)?
 - Please elaborate on the procedures related to the background check process of volunteers that sign up to use the platform, using the link below on the Corporation for National and Community Service (CNCS) requirements.
 - Describe the instant sign-up capacity that also provides background checks following the Corporation for National and Community Service (CNCS) requirements outlined on their [website](#).
 - Describe how the platform will accurately track and verify (e.g. through phone location services, supervisor approval, etc.) volunteer opportunities, volunteer hours in real time and in diverse areas (e.g. rural areas, disaster-impacted communities, limited cell service, etc.).
 - Describe how you will constantly share data with CaliforniaVolunteers (weekly, but more often if circumstances require; e.g. disasters, major volunteer events, service days, etc.), with ownership of data and all rights and privileges of the data resting with CaliforniaVolunteers (*Note: The data will belong to CaliforniaVolunteers. Therefore, regardless of any changes in ownership of the company or changes in contactor, the rights to the data will belong to CaliforniaVolunteers*).
 - What volunteer disclaimers/acknowledgements of the use of data for contact purposes, analysis, and reporting will be leveraged.
 - Address the ability to track volunteer information including basic contact and demographic information, location of service opportunities, hours completed, and manual and automatic verification of hours and volunteer duties
- **Marketplace Structure and Interoperability with Other Platforms: *please speak to the following questions and address the key requirements mentioned.***

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- If this system were to be able to participate in an open network framework that allows for interoperability with other vendors and platforms, how would the platform address specific expectations (e.g. background check requirements for certain opportunities, follow up and monitoring of volunteer information/volunteer opportunity information, group-specific volunteer requirements, etc.)
- For the contractor/vendor, address how you would make a good faith effort to participate and contribute to an open network API framework and integrate with other systems.
- Describe the technology integration, including the API or SDK process. Will the platform have object-oriented architecture?
- ***Please speak to other deliverables and partners you have worked with in the past.***
 - Provide examples of applications you have developed and partners you have worked with.

5. Personnel & Staffing

At CaliforniaVolunteers, the Project Lead will be Kaitlin Meyer, Government Affairs Specialist. Additionally, Chief Service Officer Karen Baker as well as Director of Finance and Administration Anthony Chavez will provide oversight management of the project at CaliforniaVolunteers.

6. Coordination

The contractor will work directly with Project Lead Kaitlin Meyer. There will be weekly updates and status reports provided to CaliforniaVolunteers by the contractor. Additionally, regular meetings (in-person or virtual) will be scheduled to check progress, design, and to answer basic questions and discuss issues.

7. Results & Deliverables

The deliverable for this project is a volunteer opportunity platform that can be used on both web-based and mobile application systems. See “Specifications & Requirements” for additional information on what must be included in the deliverable.

8. Timelines & Progress Reports

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- October 24th – November 1st: Receive bids from potential contractors
- November 5th: Send to Department of General Services
- Week of December 10th: Platform development begins. Preliminary meetings/conversations between CaliforniaVolunteers and the contractor to approve timeline and key benchmarks for deliverable.
- January – March 2019: Weekly Status/Progress Reports Due
- Mid-March 2019: Preliminary launch of the mobile and web-based platform.
- Early May 2019: Half-way through contract. Schedule meeting to discuss the use of the platform for the April service project. Address any needed changes and ongoing timeline for deliverables for the remainder of the contract.
- May – July 2019: Weekly Status/Progress Reports Due.
- August 2019: Finishing of project. Final presentation of the platform. Begin close out of contract.
- September 2019: End of Contract

9. Evaluation & Acceptance

Potential contractors will be evaluated on their ability to speak to both the questions previously outlined as well as the specifications and requirements. Please address all of these points, as we will be basing our decision on a potential contractor's ability to provide these elements within this volunteer platform as well as cost.

Once CaliforniaVolunteers has made a decision on the contractor, that individual/company will be notified in writing and CaliforniaVolunteers will provide further information regarding contracting, next steps, and logistics. For any questions on the process, please contact Project Lead Kaitlin Meyer (916.323.7646).

10. The project representatives during the term of this agreement will be:

State Agency: CaliforniaVolunteers	Contractor: TBD
Name: Kaitlin Meyer	Name: TBD
Phone: 916.323.7646	Phone: TBD
Fax: 916.558.3185	Fax: TBD

Direct all inquiries to:

State Agency: CaliforniaVolunteers	Contractor: TBD
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Exhibit A
Scope of Work

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Section/Unit: Volunteer Action	Section/Unit: TBD
Attention: Kaitlin Meyer	Attention: TBD
Address: 1400 10 th Street, Sacramento, CA 95814	Address: TBD
Phone: 916.323.7646	Phone: TBD
Fax: 916.558.3185	Fax: TBD

EXHIBIT B

Budget Detail and Payment Provisions

**CaliforniaVolunteers, Application Development
A Consultant Contract****BUDGET DETAIL**

Cost: \$

Cost Category	Amount
1. Labor	\$
2. Travel	\$
3. Equipment/supplies etc.	\$
Total Payment	\$

PAYMENT PROVISIONS

1. Invoicing and Payment
 - a) For services satisfactorily rendered, and upon receipt and approval of the invoices, the State agrees to compensate the Contractor for actual expenditures incurred in accordance with the rates specified herein, which is attached hereto and made a part of this Agreement.
 - b) Invoices shall include the Agreement Number and shall be submitted in triplicate not more frequently than monthly in arrears to:

CaliforniaVolunteers
Attn: Finance and Admin
1400 10th Street
Sacramento, CA 95814
2. Budget Contingency Clause
 - a) It is mutually agreed that if the Budget Act of the current year and/or any subsequent years covered under this Agreement does not appropriate sufficient funds for the program, this Agreement shall be of no further force and effect. In this event, the State shall have no liability to pay any funds whatsoever to Contractor or to furnish any other considerations under this Agreement and Contractor shall not be obligated to perform any provisions of this Agreement.
 - b) If funding for any fiscal year is reduced or deleted by the Budget Act for purposes of this program, the State shall have the option to either cancel this Agreement with no liability occurring to the State, or offer an agreement amendment to Contractor to reflect the reduced amount.
3. Prompt Payment Clause

Payment will be made in accordance with, and within the time specified in, Government Code Chapter 4.5, commencing with Section 927.

STANDARD AGREEMENT

STD 213 (Rev. 09/2018)

1. This Agreement is entered into between the Contracting Agency and the Contractor named below:

CONTRACTING AGENCY NAME

Office of Planning and Research/CaliforniaVolunteers

CONTRACTOR NAME

2. The term of this Agreement is:

START DATE

THROUGH END DATE

3. The maximum amount of this Agreement is:

4. The parties agree to comply with the terms and conditions of the following exhibits, which are by this reference made a part of the Agreement.

EXHIBITS	TITLE	PAGES
Exhibit A	Scope of Work	
Exhibit B	Budget Detail and Payment Provisions	
Exhibit C *	General Terms and Conditions	

Items shown with an asterisk (*), are hereby incorporated by reference and made part of this agreement as if attached hereto. These documents can be viewed at www.dgs.ca.gov/ols/resources/standardcontractlanguage.aspx

IN WITNESS WHEREOF, THIS AGREEMENT HAS BEEN EXECUTED BY THE PARTIES HERETO.

CONTRACTOR

CONTRACTOR NAME (if other than an individual, state whether a corporation, partnership, etc.)

CONTRACTOR BUSINESS ADDRESS

CITY

STATE

ZIP

PRINTED NAME OF PERSON SIGNING

TITLE

CONTRACTOR AUTHORIZED SIGNATURE

DATE SIGNED

STATE OF CALIFORNIA

CONTRACTING AGENCY NAME

CaliforniaVolunteers

CONTRACTING AGENCY ADDRESS

1400 10th Street

CITY

Sacramento

STATE

CA

ZIP

95814

PRINTED NAME OF PERSON SIGNING

Karen Baker

TITLE

Chief Service Officer

CONTRACTING AGENCY AUTHORIZED SIGNATURE

DATE SIGNED

California Department of General Services Approval (or exemption, if applicable)

PAYEE DATA RECORD

STD. 204 (Rev. 6-2003) (REVERSE)

1	<p><u>Requirement to Complete Payee Data Record, STD. 204</u></p> <p>A completed Payee Data Record, STD. 204, is required for payments to all non-governmental entities and will be kept on file at each State agency. Since each State agency with which you do business must have a separate STD. 204 on file, it is possible for a payee to receive this form from various State agencies.</p> <p>Payees who do not wish to complete the STD. 204 may elect to not do business with the State. If the payee does not complete the STD. 204 and the required payee data is not otherwise provided, payment may be reduced for federal backup withholding and nonresident State income tax withholding. Amounts reported on Information Returns (1099) are in accordance with the Internal Revenue Code and the California Revenue and Taxation Code.</p>								
2	<p>Enter the payee's legal business name. Sole proprietorships must also include the owner's full name. An individual must list his/her full name. The mailing address should be the address at which the payee chooses to receive correspondence. Do not enter payment address or lock box information here.</p>								
3	<p>Check the box that corresponds to the payee business type. Check only one box. Corporations must check the box that identifies the type of corporation. The State of California requires that all parties entering into business transactions that may lead to payment(s) from the State provide their Taxpayer Identification Number (TIN). The TIN is required by the California Revenue and Taxation Code Section 18646 to facilitate tax compliance enforcement activities and the preparation of Form 1099 and other information returns as required by the Internal Revenue Code Section 6109(a).</p> <p>The TIN for individuals and sole proprietorships is the Social Security Number (SSN). Only partnerships, estates, trusts, and corporations will enter their Federal Employer Identification Number (FEIN).</p>								
4	<p><u>Are you a California resident or nonresident?</u></p> <p>A corporation will be defined as a "resident" if it has a permanent place of business in California or is qualified through the Secretary of State to do business in California.</p> <p>A partnership is considered a resident partnership if it has a permanent place of business in California. An estate is a resident if the decedent was a California resident at time of death. A trust is a resident if at least one trustee is a California resident.</p> <p>For individuals and sole proprietors, the term "resident" includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for a temporary or transitory purpose. Generally, an individual who comes to California for a purpose that will extend over a long or indefinite period will be considered a resident. However, an individual who comes to perform a particular contract of short duration will be considered a nonresident.</p> <p>Payments to all nonresidents may be subject to withholding. Nonresident payees performing services in California or receiving rent, lease, or royalty payments from property (real or personal) located in California will have 7% of their total payments withheld for State income taxes. However, no withholding is required if total payments to the payee are \$1,500 or less for the calendar year.</p> <p>For information on Nonresident Withholding, contact the Franchise Tax Board at the numbers listed below:</p> <table border="0"> <tr> <td>Withholding Services and Compliance Section:</td> <td>1-888-792-4900</td> <td>E-mail address:</td> <td>wscs.gen@ftb.ca.gov</td> </tr> <tr> <td>For hearing impaired with TDD, call:</td> <td>1-800-822-6268</td> <td>Website:</td> <td>www.ftb.ca.gov</td> </tr> </table>	Withholding Services and Compliance Section:	1-888-792-4900	E-mail address:	wscs.gen@ftb.ca.gov	For hearing impaired with TDD, call:	1-800-822-6268	Website:	www.ftb.ca.gov
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For hearing impaired with TDD, call:	1-800-822-6268	Website:	www.ftb.ca.gov						
5	<p>Provide the name, title, signature, and telephone number of the individual completing this form. Provide the date the form was completed.</p>								
6	<p>This section must be completed by the State agency requesting the STD. 204.</p>								
	<p><u>Privacy Statement</u></p> <p>Section 7(b) of the Privacy Act of 1974 (Public Law 93-579) requires that any federal, State, or local governmental agency, which requests an individual to disclose their social security account number, shall inform that individual whether that disclosure is mandatory or voluntary, by which statutory or other authority such number is solicited, and what uses will be made of it.</p> <p>It is mandatory to furnish the information requested. Federal law requires that payment for which the requested information is not provided is subject to federal backup withholding and State law imposes noncompliance penalties of up to \$20,000.</p> <p>You have the right to access records containing your personal information, such as your SSN. To exercise that right, please contact the business services unit or the accounts payable unit of the State agency(ies) with which you transact that business.</p> <p>All questions should be referred to the requesting State agency listed on the bottom front of this form.</p>								