REQUEST FOR PROPOSALS FOR CSE-IT WEB APPLICATION

WestCoast Children's Clinic seeks to hire a software development firm to build a web application and underlying database to host the CSE-IT, a screening tool developed by WestCoast to improve early identification of children who are at-risk of or experiencing child sex trafficking.

Section 1: RFP Overview

About WestCoast Children's Clinic

WestCoast Children's Clinic (WestCoast), located in Oakland, California, is a non-profit community psychology clinic that has provided mental health services to Bay Area children since 1979. We provide community-based mental health services to youth and their families; train mental health professionals; and conduct research to inform practice and policy. WestCoast addresses child sex trafficking by providing specialized mental health services to over 100 sexually exploited youth each year and bolstering the protections and supports for victims of sexual exploitation through policy advocacy, community education, research, and training.

Our commitment to ending commercial sexual exploitation is driven by witnessing how poverty, inequity, racism, gender oppression, and system failures enable the commodification of children. As a clinic that integrates clinical service, training, advocacy, and research, we unveil the scope and nature of exploitation; promote better data for decision-making; and drive policy change through advocacy efforts. An example of this was our successful leadership of a coalition of advocates to de-criminalize child sex exploitation and establish a state fund for victim services, prevention, and identification in California.

Improving Early Identification of Commercially Sexually Exploited Children

Most children who are trafficked are exploited for years before adults in their life recognize it's happening. WestCoast developed and validated the *Commercial Sexual Exploitation – Identification Tool (CSE-IT)* (www.westcoastcc.org/cse-it) to help service providers accurately identify youth with clear indicators of exploitation. Since 2015 we have implemented the CSE-IT in 200 agencies in 12 states. As of January 2020, WestCoast has trained 8,000 service providers to identify the early signs of exploitation. These providers screened 88,400 youth and identified 8,200 youth with clear indicators of exploitation.

The majority of agencies use the CSE-IT through a simple web-based form. To see program trends, agencies may hire WestCoast to clean and process data collected via this form into a report, which is an added cost. The current user experience and data management process is cumbersome and time-consuming for both users and WestCoast.

Objectives of this RFP

WestCoast seeks to hire a software development firm to build a web application and database for the CSE-IT. This project will increase the visibility of youth experiencing or at risk of exploitation and expose systemic factors that perpetuate child sex trafficking, thereby closing on-ramps and creating exit ramps for survivors. A new CSE-IT application will allow us to:

- Expand universal screening to double the number of young people screened each year. Though numbers alone do not illustrate youths' experiences, an increase in screenings signals a shift in how systems treat exploited youth and a reduction in suffering.
- Increase the visibility of girls of color and transgender/gender non-conforming youth.
- Increase our knowledge about risk and protective factors so we can more effectively prevent and respond to trafficking.

At a practical level, this application will streamline the screening process for agencies using the tool, ensuring that users consistently screen vulnerable youth. It will also facilitate efficient data management. As CSE-IT implementation expands nationally, the application will promote the anti-trafficking field's ability to identify, prevent, and respond to child sex trafficking. WestCoast has secured funding for a three-year project to develop the application, pilot it with a select group of user agencies, refine features, and fully implement it with all existing and new CSE-IT user agencies.

This RFP contains detailed information about our requirements, selection timeline, and how we will evaluate and select a developer. The primary contact for this project is Hannah Haley, CSE-IT Project Director (hhaley@westcoastcc.org or (510) 460-5284).

Section 2: Need Statement

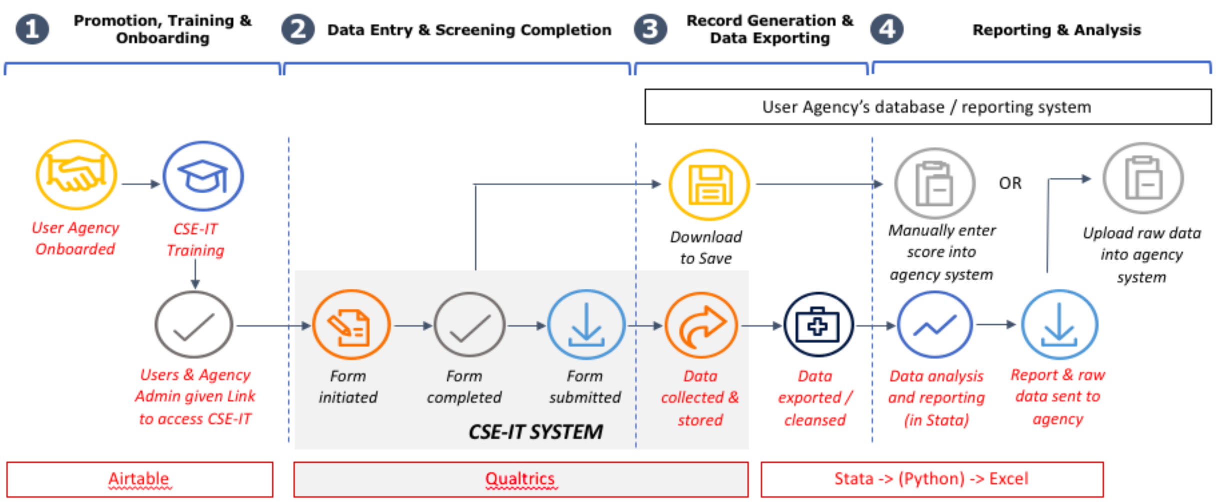
WestCoast's current state for the CSE-IT is feature-poor, cumbersome, and requires significant manual work for both users and WestCoast to process and utilize information at the individual and aggregate levels.

Current Technology

- Collect screening data via Qualtrics, a secure web-based data collection tool (represented by light grey box labeled “CSE-IT System” in diagram below)
- Export data in Excel
- Clean and analyze data in Stata
- Send reports to user sites in Excel
- Track information about users in Airtable

Current System

This diagram represents the current CSE-IT system. Red text indicates tasks/systems owned by WestCoast. Black text indicates tasks/systems owned by the user agency.

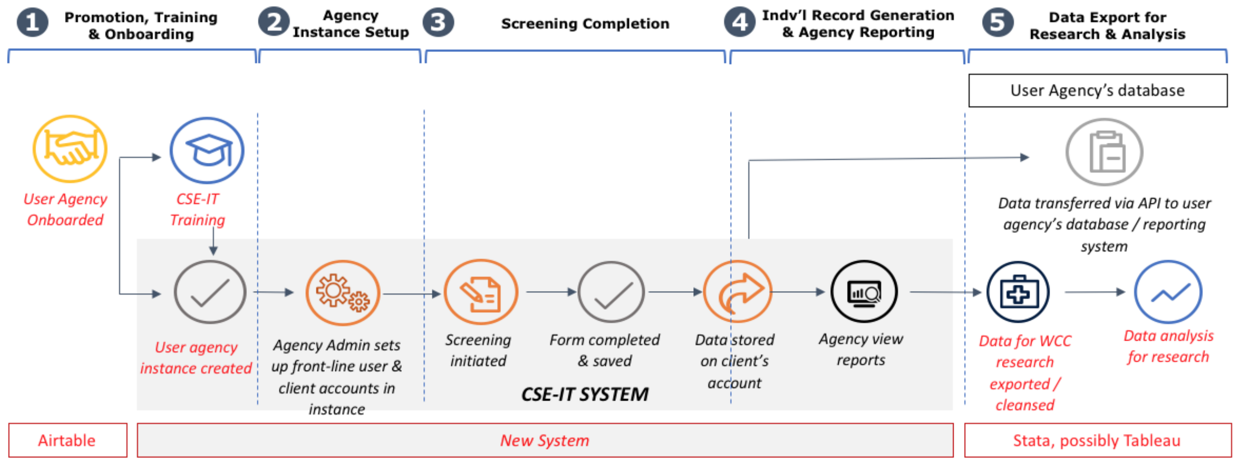


Future System Vision

WestCoast’s vision for the future CSE-IT application is a system centralizing all of the features that system users (including front-line users, agency and system leaders, researchers, and WestCoast’s project team) need to conduct their work. These include:

- Front-line users: An easy-to-use system to enter screening data, view prior scores for youth they've screened, and track completed and pending screenings. Users need to identify emerging indicators of exploitation in youth with whom they are working.
- Agency and system leaders: Access to aggregate data for youth and ability to track staff compliance with screening so that managers can monitor implementation and respond to emerging resource needs.
- Researchers and Policy-makers: A system that allows these stakeholders to answer questions about prevalence, risk and protective factors, disproportionality, and regional differences. We need this evidence to improve services and inform advocacy.

This second diagram represents WestCoast's vision for the future CSE-IT system. Red text indicates tasks/systems owned by WestCoast. Black text indicates tasks/systems owned by the user agency. More features are available within the system itself, including automated reporting of basic information, and WestCoast's resources are reserved for research rather than site reporting.



Section 3: Project Phases

Phase 1: *Requirement Development: Complete*
WestCoast developed preliminary functional and technical requirements for the future CSE-IT system. These requirements are described in Section 6 and presented in full in Appendix B.
Phase 2: *Developer Selection: 4-5 months*
See selection process and timeline in section 14.
Phase 3: *Initial System Development: 3-6 months*
Initial development of basic features needed for pilot of system as indicated in requirements document.
Phase 4: *Pilot and System Refinement: 12 months*
This phase will include pilot implementation with a select group of CSE-IT user agencies to gather user experience feedback and guide system refinement and additional feature development.
Phase 5: *Implementation: ongoing*
Following the initial pilot, WestCoast will work with all remaining CSE-IT user agencies to implement the platform and discontinue use of the legacy system.

Section 4: Goals & Objectives

Goal 1: Improve early identification of youth who are commercially sexually exploited and prevent vulnerable youth from becoming trafficked.

Objective: Increase screening protocol adherence by CSE-IT users.

- This system will support this objective by making the CSE-IT easier to use, thereby reducing barriers to screening.

Objective: Improve quality of data to support research

- This system will support this objective by securely collecting identifying information, which will allow for more in-depth understanding of trends.

Goal 2: Improve cost and labor effectiveness of WestCoast's management of CSE-IT implementation with user agencies.

Objective: Automate activities that support CSE-IT user agencies to effectively access and utilize screening data.

- This system will achieve this objective by making available historical screening data for individual clients.
- This system will achieve this objective by making available a dynamic reporting interface to display basic data from the CSE-IT (e.g., breakdown of scores by demographic categories) and support data exporting.

Section 5: Target Users and Use Cases

Use Cases describing key activities that users need to be able to complete in the system are described in Appendix A: Use Cases. Target users of the system include:

- WestCoast CSE-IT team members: Staff of WestCoast who support system implementation with user agencies
- Screeners: Line staff who conduct screening of youth
- Agency Managers/Supervisors: Access screening information to: a) monitor screener accountability to expectations; and b) understand the prevalence of trafficking among youth they serve.
- Researchers (inc. WestCoast): Controlled access to information for evaluation and research.

Detailed roles for each user type are described in Appendix A.

Section 6: Requirements List

Our requirements for the software product are detailed in Appendix B: Requirements Spreadsheet. The document indicates priority in the G Column. Clarifying questions about the requirements can be addressed during the scheduled Q&A call (see Section 12: Selection Schedule and Process)

Section 7: Data Privacy & Security

WestCoast's clients that will use the application are organizations that provide services to vulnerable children and youth. As such, the software product must adhere to ethical and legal requirements for data privacy and security. Underlying technologies, services, and systems should be setup and configured according to applicable NIST and/or SANS (or similar) standards and guidelines. The proposed solution must meet privacy and security standards as outlined in:

1. Health Information Portability and Accountability Act
2. The Health Information Technology for Economic and Clinical Health Act
3. 42 CFR Part 2

Section 8: Terms

Detailed terms of the engagement will be determined during the contracting phase. WestCoast considers the following terms non-negotiable:

1. Intellectual Property Rights: WestCoast shall own all right, title, and interest (including but not limited to copyright, licensing, and trademark rights) in and to the Deliverables. To the extent that the Deliverables incorporate Developer pre-existing intellectual property ("Developer Pre-existing IP"), and such Developer Pre-Existing IP are necessarily required for the proper functioning of the Deliverables, Developer shall grant to WestCoast a perpetual, non-exclusive, worldwide, transferable, royalty-free license to use such Developer Pre-Existing IP solely along with the Deliverables.
2. Confidentiality and Non-Disclosure: The Developer shall (i) not disclose to any third party the business of the Client, details regarding the Software, including, without limitation any information regarding the Software's code, the Specifications, or the Client's business (the "Confidential Information"), (ii) make copies of any Confidential Information or any content based on the concepts contained within the Confidential Information for personal use or for distribution unless requested to do so by the Client, or (iii) use Confidential Information other than solely for the benefit of the Client.

3. Data Ownership: WestCoast shall hold ownership and responsibility over any and all data collected by the software product.
4. Documentation: Developer shall provide detailed technical documentation of the software product to WestCoast upon completion of the contracted work.

Section 9: Skills and Experience Sought

WestCoast is seeking a firm with a full range of software development skills, including:

Project Management: WestCoast's primary project manager will be responsible for interfacing with the selected developer and getting information and decisions quickly from WestCoast's team to support forward movement of project; Developer should have internal program management support to manage the software development.

Architect: Given the size and scope of the product's implementation and future national adoption, the product requires a scalable architecture and appropriately robust underlying technology.

Developer/Engineer: Developers/engineers experienced with building similar software products.

UI/UX: Seeking a clean, intuitive, easy to navigate design. WestCoast's Communications Department will provide support around aesthetic and design to be cohesive with agency branding.

Section 10: Budget

For our three-year grant funded project, we have budgeted $250,000-350,000 for software development. Following the end of the grant, we expect to cover ongoing maintenance and software developer support needs through fees for users to access the application. This budget amount does not include secure hosting, which we budgeted for separately.

Section 11: Evaluation Criteria

1. Ability to begin project as soon as possible and no later than August 2020 and adhere to phase timeline described above.
2. Cost effectiveness in both initial and ongoing cost, including ability to propose a realistic project plan within given budget to guide WestCoast in prioritizing features. Proposal exhibits creative approaches to meeting project goals and objectives with available resources.

3. Use of open standard cloud technologies with no vendor lock-in. Proposals that rely on independent network and data services that can reliably meet our needs over large corporate entities like Google, Amazon, or Microsoft will receive preference in scoring.
4. Reasonableness of response to RFP
    a. Clarity of proposed solution.
    b. Response exhibits an understanding of WestCoast's goals and users' needs.
    c. Response is technologically sound.
5. Competency and Qualifications
    a. Team possesses necessary technical skills to complete the project.
    b. Team members have prior experience with building solutions: a) for the social/non-profit sector, b) with similar types of features, and c) that adhere to data privacy and security requirements addressed in section 7.
    c. Strength of three references.

Section 12: Selection Schedule & Process

Timeline

RFP Release date: February 4, 2020
Deadline to request Q&A call w/ WestCoast*: February 14, 2020
Q&A Calls: February 17 - March 2, 2020
Submission deadline: March 13, 2020
Finalists notified: March 27, 2020
Finalist Interviews: March 30 - April 3, 2020 *(additional written information may be requested at this time)*
Decision Announced: April 24, 2020

**A Q&A call is not required to apply but is recommended to ensure your response is competitive. Contact hhaley@westcoastcc.org to schedule.*

Submission Instructions

Proposals for this project should consist of two parts: A narrative document addressing the questions below, and a copy of the requirements spreadsheet addressing how your proposed solution will approach each requirement. The narrative portion of the proposal should address the following four areas and should not exceed 10 pages.

Continued on next page

1. Project approach
    - Process approach: briefly describe how you manage a project, including how you interface with the client, how you address roadblocks, and how you manage budget modifications.
    - Technical information:
        i. Technology and programming languages used
        ii. Hosting (address whether developer hosts and maintains software products or recommends a 3rd party host)
    - Proposed development timeline, including key milestones, addressing development of features for a) pilot phase and b) full implementation
2. Organization capabilities and project team: For each team member, please describe their role, qualifications, and experience with similar projects.
3. Quote: Please include information about:
    - How you bill (e.g., blended rate, individual rates, other; plus information about non-profit pricing)
    - Estimated cost for development, itemized by project phase or milestone
    - Estimated cost for ongoing hosting (if applicable)
    - Estimated cost for technical troubleshooting and support (if not included)
4. Three references: Please provide three references. Please include the organization/company name, brief (1 sentence) description of project, and the name, email address, and phone number of a person familiar with the project.

Appendix A: Use Cases

Case Actors	Description
CSE-IT Application ("the application")	The web application under discussion which houses the CSE-IT screening tool (all versions) and the data associated with clients
Agency Instance	An instance of the system for a partner agency of WestCoast.
Administrative user	Any user who is an employee of WestCoast Children's Clinic; administrative users have access to only the data they need to administer an agency instance.
System Coordinator	A type of Administrative User
Support	A type of Administrative User
Researcher	A type of Administrative User
Agency User	Any user who is an employee of a partner agency and has access to an agency instance
Manager	A type of Agency User. Can access all data on the Agency Instance
Supervisor	A type of Agency User. Can access data on the Agency Instance associated with Screeners assigned to them
Screener	A type of Agency User. Can access data on the Agency Instance associated with their assigned Clients
Client	The individual being screened, whose data is stored on an Agency Instance

Use Case Number	Use Case Name
Use Case 1	Create new Agency Instance
Use Case 2	User logs In
Use Case 3	Administrative user creates user accounts for new staff of an Agency Instance
Use Case 4	User creates client records
Use Case 5	Screener completes Initial Screening for new client
Use Case 6	Manager queries report
Use Case 7	Supervisor reviews list of assigned screeners and their completed screenings
Use Case 8	Screener rescreens existing client
Use Case 9	Administrative Researcher queries de-identified report to determine prevalence in a geographical area
Use Case 10	User corrects incorrect information on client record
User Case 11	Correct screening record

Use Case 12	Deactivation of user account
Use Case 13	Deduplication of client records within Agency Instance

Use Case 1	**Create new Agency Instance**
Actor	Administrative User
Overview	An Administrative User creates a new Agency Instance and grants access to the agency Manager
Trigger	External: Agency Manager completes user agreement with WCC Administrative User
Step 1	Admin User logs in
Step 2	Admin User creates new Agency Instance
Step 3	Admin User names new Agency Instance
Step 4	Admin User creates Agency Manager account
Step 5	Admin User configures Agency Instance based on user agreement terms
Step 6	Admin User grants access to Agency Manager role
Outcome	Agency Instance exists and Agency Manager has access to configure settings and establish screener and supervisor roles and client lists.

Use Case 2	**User Logs In**
Actor	User
Overview	User logs into system and is granted access to information and features based on their role and permissions.
Trigger	External: User determines task needs to be completed in system
Step 1	User navigates to login URL
Step 2	User enters email address and password
Step 3	User is logged in and directed to dashboard or landing page
Step 4	User accesses features or data available to their role and permission settings
Outcome	User accesses system

Use Case 3	**User creates user accounts for new staff of an Agency Instance**
Actor	Agency Manager, Supervisor, or Administrative User
Overview	User creates new user accounts and assigns roles and permissions to new Users
Trigger	User has new users to add to Agency Instance
Step 1	User navigates to Agency Instance configuration panel
Step 2	User creates user accounts with name and email address

Step 3	User sets role or permission set for new User
Step 4	User assigns client lists to new User
Step 5	User sends password-setting prompt to new User's email
Outcome	New User accounts are created.

Use Case 4	**User creates client records**
Actor	Agency Manager, Supervisor, or Screener
Overview	User creates client records, enters demographic information, and assigns the client records to a Screener's client list
Trigger	Agency User is configuring client lists within the Agency Instance
Step 1	Agency User logs in and navigates to client list panel
Step 2 (option A)	Agency User enters new client name, demographic details, and details pertaining to de-duplication
Step 2 (option B)	Agency User imports client list from an existing file
Step 3	Agency User assigns new client(s) to Screeners
Step 4	Agency User turns on Screening Reminder Triggers as needed
Outcome	New client records are created and assigned to a Screener, and a reminder is set to trigger initial and ongoing Screenings

Use Case 5	**Screener completes Initial Screening for new client**
Actor	Screener
Overview	A Screener has new clients to screen, and logs into the system to conduct the screening and log any necessary follow-up
Trigger	A new client is assigned to a Screener, or receives a reminder notifying the Screening that an Initial Screening is due
Step 1	User logs in and navigates to client record
Step 2	User completes screening using appropriate version of CSE-IT
Step 3 (path A)	Screening score is "No Concern." User saves score to client record and exits client record.
Step 3 (path B)	Screening score is "Possible Concern" or "No Concern"
Step 4 (path B)	User is triggered to plan or complete follow-up tasks based on Screening Score.
Step 5 (path B)	User logs planned and completed follow-up tasks to client record and exits client record.
Outcome	User completes Initial Screening for new client and logs planned or completed follow-up steps based on score and follow-up tasks configured by Agency Manager.

Use Case 6	Manager queries report
Actor	Agency Manager or Agency Supervisor
Overview	An Agency Manager or Supervisor seeks to view a report of screening outcomes for active clients in Agency Instance.
Trigger	Agency Manager or Supervisor needs information about number of youth screened, and distribution and frequency of scores.
Step 1	Manager/Supervisor logs in and navigates to report panel
Step 2	Manager/Supervisor selects desired report from reports available based on their user permissions
Step 3	Manager/Supervisor inputs desired date range for report
Step 4	Manager/Supervisor queries report
Step 5	System displays report
Step 6	Manager/Supervisor views report, with options to export and save or print
Outcome	Manager/Supervisor is able to query, view, and save or print desired report

Use Case 7	Supervisor reviews list of assigned screeners and their completed screenings
Actor	Agency Supervisor or Agency Manager
Overview	Supervisor or Manager needs to review the screenings completed by their assigned staff to review if staff are complying with screening expectations
Trigger	Supervisor/Manager needs information about staff compliance with screening expectations
Step 1	Supervisor/Manager logs in and navigates to assigned screener list
Step 2	Assigned screener list displays compliance statistics for each screener
Step 3	Supervisor/Manager clicks Screener name to navigate to detail
Step 4	Screener detail displays screenings completed on time, screenings completed late, screenings overdue, and screenings due.
Step 5	Supervisor/Manager returns to Assigned Screener List
Step 6	Supervisor/Manager selects filtered list to display Screeners with overdue reports (or other available criteria)
Outcome	Supervisor/Manager is able to view compliance information for Screeners in list or detail format

Use Case 8	Screener Rescreens existing client
Actor	Screener
Overview	Screener conducts rescreening of existing client following a reminder notification
Trigger	Reminder notification (via email or on screener dashboard after logging in)
Step 1	Screener logs in and views list of re-screenings due
Step 2	Screener navigates to client record and views prior screening score and planned follow-up history
Step 3	User completes re-screening using appropriate version of CSE-IT
Step 4 (path A)	Screening score is "No Concern." User saves score to client record and exits client record.
Step 4 (path B)	Screening score is "Possible Concern" or "No Concern"
Step 5 (path B)	User is triggered to plan or complete follow-up tasks based on Screening Score.
Step 6 (path B)	User logs planned and completed follow-up tasks to client record and exits client record.
Outcome	User completes Initial Screening for new client and logs planned or completed follow-up steps based on score and follow-up tasks configured by Agency Manager.

Use Case 9	Administrative Researcher queries de-identified report to determine prevalence in a geographical area
Actor	Administrative researcher
Overview	Researcher queries a report of data to show prevalence of "clear concern" scores in a designated geographical area
Trigger	Partner agency requests analytic report comparing their agency data to a regional prevalence.
Step 1	Researcher logs into administrative dashboard
Step 2	Researcher navigates to reports panel
Step 3	Researcher enters query parameters: geographic area, date range, and which frequencies and demographics to display
Step 4	System identifies data meeting query parameters and presents a de-identified report to the researcher displaying selected items
Step 5	Researcher exports data included in report (with PII hashed or hidden, and random identifier assigned by system to duplicate clients).

Step 6	Researcher exports tables and charts generated by report panel for selected parameters.
Outcome	Researcher is able to determine prevalence in the designated geographic area; researcher is able to compare a single agency's prevalence to regional prevalence.

Use Case 10	**User corrects incorrect information on client record**
Actor	Agency Manager or Supervisor, Screener if Agency Instance permissions allow
Overview	Incorrect information is stored to a client record; an Agency Manager or Supervisor corrects the information
Trigger	User identifies incorrect information (e.g., incorrect demographic information, out of date contact information)
Step 1	Manager or Supervisor logs in and navigates to client record
Step 2	User identifies incorrect information and clicks on edit control
Step 3	User corrects the pertinent information and saves the correction
Outcome	User is able to correct client record

Use Case 11	**Correct screening record**
Actor	Agency Manager or Supervisor, Screener if Agency Instance permissions allow
Overview	Screener enters incorrect answer on screening form or enters screening on incorrect client record; screening form is corrected.
Trigger	User identifies screening error
Step 1	Manager or Supervisor logs in and navigates to screening record
Step 2	User identifies incorrect information and clicks on edit control
Step 3	User corrects the pertinent information and saves the correction
Outcome	User is able to correct screening record

Use Case 12	**Deactivation of user account**
Actor	Agency Manager or Supervisor, or Administrative User
Overview	User leaves employment at agency; manager or supervisor deactivates user account and reassigns client records to other users.

Trigger	User account needs to be deactivated (end of employment; change in staff role)
Step 1	User navigates to Agency Instance configuration panel
Step 2	User identifies user account to deactivate.
Step 3	User either reassigns client records assigned to User who is being deactivated, or system automatically reassigns client records to the deactivated User's supervisor.
Outcome	User account is deactivated and client records are preserved and reassigned.

Use Case 13	**Deduplication of client records within Agency Instance**
Actor	Agency Manager or Supervisor, Screener if Agency Instance permissions allow
Overview	Duplicate client records are identified and merged.
Trigger	User identifies a duplicate client record
Step 1	User navigates to client record management panel
Step 2	User identifies duplicate client records
Step 3	User initiates deduplication process
Step 4	User is able to select information a primary record to maintain, and information from the secondary record to be merged to the primary record.
Step 5	Deduplication is completed and the action is logged.
Outcome	Duplicate client records are merged and all pertinent information maintained on the merged record.