



***National Program Database:
Request for Proposals***

July 20, 2010

Project Summary

About Experience Corps

Experience Corps, an award-winning national program, engages people over 55 in meeting their communities' greatest challenges. Today, in 22 cities across the country, 2,000 Experience Corps members tutor and mentor elementary school students, help teachers in the classroom, and lead after-school enrichment activities. Independent research shows that Experience Corps boosts student academic performance, helps schools and youth-serving organizations become more successful, and enhances the well-being of older adults.

Experience Corps has two primary service interventions to support students reading proficiency in grade K-3: 1:1 tutoring and classroom assistance. Within the one-to-one tutoring model, an EC member is paired with a student for a 30-45 minute session twice per week. Within the classroom setting, members are assigned to work with small groups of children under the direction of the teacher. You can learn more at www.experiencecorps.org.

Project Description

Experience Corps is designing a National Program Database (NPD) to help local affiliates manage their daily program operations and aggregate information about members and students across the country. We are excited to build a program management system that can help sites track the many activities they perform every day in our schools. And nationally, we look forward to building a dataset that will help us better understand the factors that drive student achievement and member effectiveness—providing evidence that informs service delivery improvements and creates compelling material for marketing efforts. Our goals with the NPD are to:

- Develop a database for affiliates to manage the daily operations of their Experience Corps program, including member recruitment, student management, member placement with teachers and students, and the daily activities performed by Experience Corps members.
 - If desired, affiliates may use their own separate program management system instead, in which case the NPD should facilitate easy importing and exporting of data with other systems.
- Create a system that allows national research staff to analyze data about members and students at each affiliate, which will ultimately help Experience Corps provide better data and support to local programs.
- Build a data structure that allows the national Experience Corps to compare program operations across cities. This means that the NPD should be:
 - A tool that requires affiliates to collect a core set of data elements that are the same at all sites.
 - A tool that allows each affiliate to add their own data elements beyond the national standards, customizing the application to meet their local needs.
- Try to minimize the data entry burden on affiliates while still achieving the other objectives listed here. The ideal NPD will have an intuitive interface and integrate with the AmeriCorps eGrants system.
- Ensure the data in the NPD is as up-to-date and accurate as possible. We want the capacity to collect data real-time, although we recognize that this may not be feasible for all affiliates.

How We Developed This Document

Over the past three months, we have conducted a significant amount of research to understand how affiliates run their programs, what data gets collected at each site, the challenges that affiliates face to get data into a technology system, and the information we would all like to collect moving forward. This included:

- Reviewing all data elements on the surveys, forms, and reports required by the national office
- Interviewing national Experience Corps staff to understand their goals and vision
- Surveying all affiliates about how they collect data and store program information (100% response rate)
- Collecting and comparing the spreadsheets and databases sites use to track data (90% response rate)
- Interviewing Baltimore City, Bay Area, and Minneapolis/St. Paul affiliates to understand how the Experience Corps program works on the ground, and the challenges they face vis-a-vis data collection

This overview represents the voice of all sites and is a collective vision for what the NPD should accomplish.

Database Content

The database will track the following information about each affiliate's Experience Corps program:

- **Student Information & Enrollment**
 - Demographic information (e.g., age, ethnicity, zip code of their school)
 - Releases and emergency contact forms (do they have relevant consent and release forms signed?)
 - Enrollment status (e.g., start/end date in program, whether they are waiting for a tutor)
- **Member Recruitment**
 - Demographic information (e.g., age, ethnicity, contact information, zip code)
 - Application status (e.g., when they applied, status in the application process, have they passed all appropriate background checks and screening stages and training)
 - Ability to fill out an information request online
 - Application questions (how did they respond to specific questions on the application?)
 - Marketing effectiveness (e.g., how applicant heard about Experience Corps, whether members are returning for multiple years of participation)
- **Member Information & Enrollment**
 - Demographic information (same as in member recruitment above)
 - Enrollment status (e.g., start/end date and length of time in the program, are they stipended, ability to suspend a member and record active/inactive dates if they are taking time off from the program)
 - Role(s) in the Experience Corps program (one-to-one tutor, classroom assistant, site coordinator)
 - Releases and emergency contact forms
 - Training and ongoing education (e.g., attendance at team meetings, have they done all trainings)
 - Results of Member Progress Review
- **Member Attendance & Payroll**
 - Funding source(s) for the member's stipend including amount of stipend
 - Timesheets and stipend payments
 - Attendance at other events, such as in-service days, recognition events, or leadership opportunities
- **One-to-One Tutoring**
 - Initial assessment of student's needs
 - Match status (e.g., start/end date, length of relationship, member and students' names)
 - Dosage and content (e.g., daily activity log of hours spent, content covered, progress of student's learning, attendance/absence of member and student at each tutoring session)
- **Classroom Assistance**
 - Match status (e.g., start/end date, length of relationship, member and teacher's names)
 - Dosage and content (e.g., daily hours spent, content covered if applicable, activities completed)
- **Teachers & Schools**
 - Contact information (including a link to the district website)
 - Ability to link tutoring and classroom assistance work to the teacher and school where it happened
- **Surveys**
 - Fill out an existing Experience Corps survey, including: 1:1 Tutoring Survey (Pre & Post), Classroom Assistance Survey, Member Progress Review, Member Survey (Pre & Post), Mentoring Survey (Pre & Post)
 - Ability to modify existing national surveys, add new national surveys, and allow local affiliates to add their own supplemental questions to standard national surveys

Database Users

The key users of this database are as follows:

- Affiliates Who Will Use the NPD as Their Program Database

In the first few years, we envision most information to be captured on paper and data will be entered in bulk by one central data entry person. Over time, we hope to have members bypass paper completely and enter information into the NPD themselves.

Key Users:

- *Program Managers / Site Coordinators:* Each site has a small set of employees who are overseeing program activities. Although each affiliate staffs this function differently, these employees would generally have access to all database functions within their local school or site.
- *Payroll:* Accounting staff will need access to the NPD solely to track the hours served by each member, the contracts under which they are currently funded, and the remainder of time left of their contracts. (May be the same as the Program Manager.)
- *Local Site Administrator:* Each affiliate should have one person designated as their local site administrator, who will have full view/edit/delete access for the entire site. This person would also be responsible for synchronizing data between the NPD and other systems mandated by their funders or host agency. Sites will vary in terms of how they staff this position and the technical expertise of the person filling this role. (May be the same as the Program Manager.)

Future Users:

- *Experience Corps Members:* Members work in public schools to provide tutoring, mentoring, and homework help to children in need. Members are typically over 55, though some current members range in age from late 40s to early 90s. Their technical skills vary widely; some are uncomfortable with computers and do not have an email address. If an affiliate chose to roll out the NPD to its members, they would be primarily using it to enter their daily activities at school (such as the hours they spent and the content they covered tutoring children that day).
 - *Fundraising and Executive Staff:* Executive staff at the local sites will be able to pull predefined reports for marketing and fundraising purposes. This might include the demographic breakdown of students and members, the number of hours served by their members in the last year, or the educational outcomes of the students in their Experience Corps program.
- Affiliates Who Have Their Own Program Database
 - *Local Site Administrator:* This user will be responsible for exporting data from their program database and importing it into the NPD. They will be moderately tech-savvy.
 - National Office Users
 - *National Program and Research Staff:* These users will analyze data about affiliates' program operations and work with affiliates to understand the trends emerging from the data. They will be tech-savvy and knowledgeable about data analysis. They should be able to see granular detail about the operations at each site.
 - *Technical Support for Local Affiliates:* There will be at least one person at the national office responsible for supporting local affiliates as they use the database. This person should have the ability to impersonate a user at a local site to see the exact user experience for the local affiliate. They will be tech-savvy.
 - *Fundraising and Executive Staff:* These staff members will not have their own user account, but will instead request reports from one of the above users.

Key Features

Standardization by National, Customization by Local Affiliates

There are three types of Experience Corps affiliates: sites who offer the one-to-one tutoring model only, sites who offer the classroom assistance model only, and sites who offer both models. With the NPD, Experience Corps will establish a standard set of data elements to be used for each of these operating models.

Although every affiliate follows a similar process to run their Experience Corps program, they differ in the specific details of how they run their program. For example, some sites ask their members to fill out an application before the interview while others do it after the interview; sites have different tests that they ask members to perform before a member is accepted into the program; some sites add questions to the national feedback surveys that go out to teachers and members; and affiliates have different criteria they use to match members to classrooms and students. Thus, the NPD will need to provide a standard set of national data elements as well as the opportunity for local affiliates to customize the system to meet their own unique needs. Our ideal system would also notify the national office when an affiliate adds a new custom field.

Ease of Use

The NPD must have a simple user interface and match the workflow of local affiliates. The ideal system would:

- Allow users to enter timesheets quickly. This is one of the biggest data entry demands on affiliates: on a weekly or monthly basis, Site Coordinators take the activity logs from each school and enter the time each member spent with each student or classroom each day. A poor interface would require the user to look up each student individually, click to view their page, click to enter a new activity log entry, and fill it out for that one single interaction. A good interface might display a grid of all members, their classrooms, and the students they typically tutor for a given week; fill the screen with defaults (e.g., start by assuming everyone attended every session); and then the user could enter exceptions to each session as needed. We are open to different solutions to this task but want to make the process as streamlined as possible.
- Provide a simple interface to add new students or members, look up existing students and members, and view the entire relationship history of the student or member on one screen.
- Provide drop-down boxes whenever possible to limit the options for data entry. For example, instead of having an open text field for gender, the user would see a dropdown menu where they could choose either Male or Female from the list.
- Provide simple out-of-the-box reporting capabilities so Experience Corps can create standard reports used across the network.
- Provide a more advanced querying capability and/or an ability to export data to Excel or SPSS for more advanced data manipulation.

Survey Engine

The NPD should have a robust survey engine or be able to integrate tightly with a third-party survey product. The ideal system would:

- Allow local affiliates to customize the look and feel of the surveys while still including the Experience Corps logo.
- Pre-populate information on surveys based on the site who is filling it out. For example, if a teacher survey could be automatically generated for every teacher at a school and pre-populate with the information we already know about the member serving in that classroom, that would simplify data entry.
- Be able to fill out the survey online or print a hard copy for members and teachers who prefer paper
- Include skip logic so that if a user responded in a certain way they would be skipped to a future question
- Generate real-time reports of survey data and/or export to Excel or SPSS
- Relate to program information in the NPD – for example, Experience Corps might to analyze survey data for the subset of members who did more than 20 tutoring sessions with their mentee

Security

Access levels in the NPD should be controlled by two related security functions: site access (which schools and cities the person can access) and edit permissions (whether the person can edit records or just view them).

Site access options:

- *National Access*: Can see information about all affiliates
- *Affiliate Access*: Can see information about all of the schools, members, and students in their city
- *School Access*: Can see information about members and students in their school (a person could have permission to access more than one school)
- *Member* : Can see information about their classroom and matched students only (this implies that the NPD will be able to look at the member's match status and determine their access levels based on who they are matched to)

Edit permissions options:

- *Full Access*: Can view, edit, add new, and delete records within their site access level
- *Read Only*: Can view records within their site access level
- *Reports Only*: Can only view reports with de-identified information (student and member names removed) within their site access level

Importing and Exporting Data

Experience Corps affiliates will rely heavily on the NPD to import and export data. In surveys and interviews, affiliates expressed significant concern that the NPD will become yet another system they have to use to double-enter information. Thus, the system must have a fully-featured data import and export function, ideally with the ability to save a data import/export scheme so users can repeat imports/exports with one or two clicks.

Technical Requirements

At schools, our users have a wide variety of technologies accessible to them. The system should be web-based and compatible with both PCs and Macs.

We also hope that our system can grow in the future to meet the demands of affiliates who rely on paper. For example, we could envision using bar codes to scan attendance sheets; bubble sheets to scan paper surveys; or a way to store scanned paper documents like parental release forms. We also imagine eventually entering data from classrooms, potentially on mobile devices such as Blackberry, iPhone, or Tablet PCs.

Key Selection Criteria

The key selection criteria we are using throughout this process are:

- *Totality of Features (40%)*. We are looking for a system that can integrate a wide variety of features, including student management, volunteer recruitment and management, online surveys, member funding, and payroll. Moreover, we are looking for a system that has numerous levels of security, provides robust data import/export functionality, and allows standardization by the national office with customization by local affiliates. Thus, one of our key selection criteria is that the solution we choose – whether it is one product or an integration of multiple products – can accomplish all of the things we need in a well-integrated manner.
- *Ease of Use (20%)*. We are looking for a system with a clean and simple user interface. The system interface should be able to be tailored to the way on-the-ground staff do their work, so it feels intuitive to them. Many of our Experience Corps members are older adults, so the system must also be accessible with larger screen fonts if needed.
- *Cost (20%)*, including one-time costs of purchase and customization, ongoing licensing and support fees, and how the costs scale as we add new affiliates, users, members, and students.
- *Vendor Experience & Relationship (20%)*. We are looking for a vendor who has experience working with a growing, national nonprofit who has numerous affiliates. Our ideal vendor will be able to speak in business and technical language, translate our operational model into a technology solution, and be a thought partner with us throughout the product implementation and rollout.

- *Note: Utilization of Off-the-Shelf Software.* Please note that we do not have a software developer in-house, so we prefer integrations and customizations of existing products (e.g., Salesforce.com) as opposed to building a solution completely from scratch.

Selection Timeline & Response Process

We are estimating the following timeline for selecting a vendor for this project:

July 20	RFP released
August 10	Written responses due by 5:00pm EDT (see format below)
August 20	Vendors selected for follow up interviews, sent more detailed requirements
September 10	Vendor interviews complete
September 17	Reference checks complete
September 17	Final vendor chosen
September 30	Contract negotiation complete and implementation begins

Please send your written response to database@experiencecorps.org by 5:00pm EDT on August 10, 2010. We are currently working on more detailed requirements for the system, which will be provided to vendors invited into the second round; in the meantime we are willing to answer clarifying questions if submitted by email. Please address all inquiries to Zach Goldstein.

Your written response to this RFP must include the following items:

- Platform & Company Details
 - Describe how your system meets our complete list of requirements specified in this RFP.
 - Provide brief background about your company, its size, how long it has been in existence, and the software platform you propose we use for this project.
- Screenshots

We would like to see a few screenshots from systems you have built so we can get a sense of the usability of your system. Please provide screenshots that illustrate the scenarios below (you are welcome to substitute other examples as long as they illustrate a similar process to what we are describing in these scenarios):

 - *Entering Tutoring Session Logs.* I am a local site coordinator and just received 10 tutoring session logs to enter into the database. All of these session logs came from Jane Member, and Jane filled out four logs for each of the three children she is tutoring. (An Experience Corps member fills out one session log after each one-on-one tutoring session with a child, which includes: date and time of the session, duration of the session in minutes, the content that was covered, and notes about what happened.) Please show each screen the site coordinator would see when entering Jane's logs – from looking up Jane's record to entering session logs in bulk.
 - *Creating Custom Reports.* I am a local site coordinator and want to produce the following custom reports from scratch: 1) How did prospective members hear about our program? 2) List all kids with the member they are currently matched to, including the age, gender, and zip code of the member and the student. Please show each screen the site coordinator would see when designing the report, as well as a sample report output.
 - *Pre vs. Post Test.* For each student who received tutoring through Experience Corps, a teacher fills out a survey at the beginning and end of the year. This survey includes information about the student's academic performance, attitude, and social skills. Please show the interface for how a teacher would fill out an online survey. Please also show how a site coordinator could compare the response to the question "Please rate this student's social skills: Excellent, Good, Fair, or Poor (select one)" at the beginning of the school year vs. the end of the school year.
- Cost Estimate
 - We recognize that this RFP does not have enough detail to put together a complete estimate, and we are planning to provide more detailed information about the NPD to vendors who are selected into the second round. However, we would appreciate some initial estimated ranges of

how much it would cost for: product purchase, implementation and customization, training and support, ongoing licensing and support fees, and how costs would grow as we grow (i.e., cost of adding new users, cities, or members/students to the platform).

- Please describe three projects you have completed that were similar to ours. What was your role on each project? How was it similar/different from our project? What did it cost these customers for the full design and implementation?

This is an open and competitive process. It is Experience Corps's policy to employ and compensate vendors without regard to race, color, religious creed, citizenship, political activity or affiliation, marital status, age, national origin, ancestry, physical or mental disability, medical condition, sexual orientation, veteran status, family care status, sex or gender.