



Utah Community Action™

1307 South 900 West Salt Lake City, Utah 84104

(801) 977-1122 | utahca.org

REQUEST FOR PROPOSAL – Custom Customer Relationship Management (CRM), Case Management, Reporting, and Analytics Platform

PART 1: INTRODUCTION AND INSTRUCTIONS

PURPOSE OF REQUEST FOR PROPOSAL (RFP)

The Organization is seeking competitive proposals from qualified firms to design, develop, implement, and support a custom Customer Relationship Management (CRM), Intake, Case Management, Reporting, and Analytics Platform.

The purpose of this project is to create a unified system that supports client intake, case management, service tracking, referrals, program management, reporting, dashboarding, and cross-program visibility while reducing duplicate data entry and increasing operational efficiency.

The selected solution shall provide a centralized platform capable of replacing current tools and systems including IntakeQ, ChildPlus, and ClientTrack and establishing a long-term foundation for data-driven decision making, reporting, automation, and future artificial intelligence initiatives.

AGENCY BACKGROUND

Utah Community Action's mission is to empower individuals, strengthen families, and build communities through self-sufficiency and education. The agency has approximately 500 employees, and annual revenues of approximately \$50M.

Services are delivered through six core programs:

- **Workforce Development** – Helps adults gain job skills, training, and certifications.
- **Head Start** – Provides high-quality early childhood education, health and family support services for children age 0-5.
- **HEAT** – Assist households with utility, and emergency energy needs.
- **Case Management & Housing** – Supports families in finding and maintain safe, affordable housing.
- **Nutrition** – Provides meals, food assistance, and nutrition education.
- **Weatherization** – Improves home energy efficiency and safety for households.

Utah Community Action complies with the required federal regulations on procurement, as set forth in the Uniform Guidance 2 CFR Part 200.

PROPOSAL SUBMISSIONS OVERVIEW

By submitting a proposal, interested Parties acknowledge and agree that the scope of work and evaluation process outlined herein is fair, equitable, and understood. Interested Parties further acknowledge that they have read this RFP, along with any attached or referenced documents. All



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costs incurred by Interested Parties in the preparation and submission of a proposal, including any costs incurred during interviews, presentations, or demonstrations, are the responsibility of the Interested Parties and will not be reimbursed.

Proposals received after the deadline will not be accepted. Proposals must be submitted according to the directions outlined in this RFP. Any proposal not meeting the requirements of this RFP may be rejected. All materials submitted will become the property of Utah Community Action.

PROPOSAL KEY DATES

RFP Released	October 8, 2026
Questions on RFP Due	October 22, 2026
Response to RFP Questions Posted	October 26, 2026
Proposal Due Date	November 5, 2026, 5:00pm
Award Notice	November 13, 2026

Utah Community Action may request interviews or meetings with any of the proposers to clarify any proposals.

WRITTEN QUESTIONS

Questions regarding the RFP must be received in writing by October 22, 2026, by 5:00 pm. Questions may be submitted to Stacy Weight, CAO (stacy.weight@utahca.org). All questions will be answered in writing and will be made available to all proposers.

SUBMISSION DEADLINE

Deadline for Submission: November 5, 2026 by 5:00 PM MST

Submission Format: Proposals should be submitted electronically in PDF format to Stacy Weight, CAO (stacy.weight@utahca.org). Hard copies may be provided if preferred.

CONTRACT TERMS

It is anticipated that this project will span multiple years. All contracts will begin immediately upon receiving the signed contract. Contract will initially end December 31, 2028, but will have an option for 3 one-year extensions if needed to complete project requirements. All contracts must contain a 30-day escape clause. Pricing may be negotiated at the beginning of each contract year or each new phase of implementation.

SUBMISSION INSTRUCTIONS AND CONTACT INFORMATION

The preferred method of submitting your proposal is via electronic copy. When providing a hard copy,

one (1) original and one (1) copy must be submitted prior to deadline at the following address:

Utah Community Action
Attn: Stacy Weight, CAO
1307 South 900 West
Salt Lake City, UT 84104

General Contact: Stacy Weight, Chief Administration Officer, stacy.weight@utahca.org

PART 2: SCOPE OF WORK AND PROPOSAL REQUIREMENTS

To ensure a competitive and consistent review process each proposal submitted should include the following items and be organized with the outline provided below.

1. Letter of intent

A letter outlining the general overview of the business information and individuals who will be involved in the RFP process. This letter should be a maximum of 1 page and clearly identify the contact information for the authorized representative. It should also include a date through which the proposal is valid (recommended 90 days).

2. Profile of Proposer

Please include an overview of the scope of the company (local, national, international) and size. Also indicate the ability to do business in the state of Utah.

The profile should also address the following questions:

- Your Company name and address:
- Year founded
- Provide a brief history of your company.
- This section should also include at least 3 references.
- Relevant experience
- Organizational structure
- Primary project contacts

Technical Solution

Provide detailed descriptions of:

- Proposed architecture
- Data model approach
- Security model



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- Integration strategy
- Reporting and analytics capabilities
- Hosting model
- Disaster recovery and business continuity capabilities

Project Methodology

Describe:

- Discovery approach
- Requirements gathering process
- Design methodology
- Development methodology
- Testing approach
- Training strategy
- Change management process
- Deployment methodology

Implementation Schedule

Provide:

- High-level project timeline
- Milestones
- Resource requirements
- Dependencies
- Assumptions

Pricing

Provide fixed-price pricing and clearly identify:

- Discovery and design
- Platform implementation
- Data migration
- Integrations
- Dashboard development
- Training
- Support
- Optional enhancements
- Licensing costs
- Ongoing maintenance costs

3. Contract Terms



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All contracts will begin immediately upon receiving the signed contract. Contract will end December 31, 2028, but will have an option for 3 one-year extensions.

Product pricing will be negotiated at the beginning of each one-year extension.

All contracts must contain a 30-day escape clause.

4. The desired Solution should

- Eliminate duplicate client and household records.
- Reduce manual data entry and administrative burden.
- Improve data quality and consistency across programs.
- Provide a unified client and household view.
- Improve referral tracking and service coordination.
- Support configurable business processes.
- Deliver real-time dashboards and reporting.
- Support future automation and AI-driven capabilities.
- Create a scalable platform capable of supporting future program growth.

PART 3: PROJECT OVERVIEW

The selected vendor shall provide services necessary to:

Discovery and Design

- Conduct stakeholder interviews and requirements gathering.
- Document current and future-state business processes.
- Develop functional and technical requirements.
- Create data architecture and system architecture recommendations.
- Define governance and security models.
- Develop implementation roadmap and phased deployment plan.

CRM and Case Management Platform

The proposed solution should support:

- Individual client records
- Household records
- Case management
- Intake and enrollment
- Referral management
- Appointment management
- Program eligibility tracking
- Service delivery tracking



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- Document management
- Workflow automation
- Communication and engagement tracking
- Audit history and compliance reporting

The solution shall allow multiple departments and programs to operate from a common data structure while maintaining appropriate security controls.

Reporting and Dashboarding

The solution shall provide:

- Executive dashboards
- Operational dashboards
- Program performance dashboards
- Workforce and service delivery analytics
- Custom report creation capabilities
- Scheduled report delivery
- Ad hoc reporting tools
- KPI tracking
- Data export capabilities

Dashboards should support role-based visibility and near real-time reporting where practical.

Integrations

Proposers should describe:

- Integration approach
- Data synchronization methodology
- Master data management strategy
- Migration approach
- APIs and interface technologies utilized

The organization reserves the right to retain, replace, or phase out any of these systems over the duration of the project.

Data Platform

The solution should include a centralized reporting and analytics framework capable of:

- Consolidating data from multiple systems
- Providing data quality controls
- Supporting historical reporting
- Supporting dashboarding and analytics



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- Supporting future AI and predictive analytics initiatives

Vendors should describe their recommended approach to data warehousing, data governance, and analytics architecture.

FUNCTIONAL REQUIREMENTS

The proposed solution should support, at minimum:

Intake

- Online intake
- Staff-assisted intake
- Mobile-friendly forms
- Electronic signatures
- Document uploads
- Eligibility screening

Client Management

- Individual profiles
- Household profiles
- Service history
- Referrals
- Communication tracking
- Case notes

Workflow Automation

- Task management
- Notifications
- Escalations
- Approval workflows
- Assignment rules

Reporting

- Dashboard creation
- KPI monitoring
- Custom reporting
- Export capabilities
- Scheduled reporting

Security

- Role-based access controls
- Audit logging
- Data retention management
- Encryption of data in transit and at rest

PART 4: SELECTION PROCESS

The evaluation will be completed using a weighted scale with the specified factors below.



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Functional Fit	30
Technical Architecture	20
Reporting & Analytics Capability	10
Integration & Data Migration Approach	10
Vendor NFP CRM Experience & References	10
Implementation Methodology	5
Training & Support	5
Cost	5
Small Business and Labor Surplus per Uniform Guidance 2 CFR Part 200.321	5
Total	100

Selection will be made to the proposer who is the most advantageous to Utah Community Action based on the selection criteria outlined above. UCA reserves the right to not select any proposer. Following the closure of the RFP, all proposers will be notified of the selection.