



Serving Baker, Grant, Harney, Malheur, Morrow,  
Umatilla, Union and Wallowa Counties

## **REQUEST FOR PROPOSAL**

### **Customer Referral System for WorkSource Oregon Eastern Oregon**

Release Date: February 14, 2025

Due Date: March 10, 2025 (5:00 PM PT)

EOWB is an equal opportunity employer. With 48 hours of notice, auxiliary aids and services, and alternate formats are available to individuals with disabilities and/or limited English proficiency free of cost. Requests can be made directly to EOWB or with assistance to TTY: Oregon Relay services at 1-800-735-1232.

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# Table of Contents

- SECTION I: PURPOSE..... 1
- OVERVIEW..... 1
- TIMELINE..... 1
- ELIGIBLE RESPONDENTS..... 1
  
- SECTION II: BACKGROUND..... 2
- EOWB navigator project goals:..... 2
  
- SECTION III: Scope of Work..... 3
- Objective..... 3
- Sharing Customer Referrals Between Service Providers..... 3
- System Deliverables:..... 3
  
- SECTION IV: SUBMISSION INFORMATION AND REQUIREMENTS..... 6
- COMMUNICATION..... 6
- CONTACT WITH BOARD MEMBERS OR STAFF..... 6
- SUBMISSION..... 6
- WITHDRAWAL..... 6
- APPEALS..... 6
  
- SECTION V: PROPOSAL CONTENT..... 7
- 1. Customer Referral System Proposal Cover Form..... 7
- 2. Proposal Narrative..... 7
- 3. Development Budget Form..... 7
- 4. Proposal Formatting..... 7
  
- SECTION VI: EVALUATION AND SELECTION..... 8
  
- SECTION VII: PROVISIONS & DISCLAIMERS..... 10

## SECTION I: PURPOSE

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### OVERVIEW

The Eastern Oregon Workforce Board (EOWB) invites proposals from qualified vendors to design and implement a Customer Referral System. This system aims to improve service delivery, streamline referrals, and enhance collaboration across Oregon’s community services network. The solution should align with EOWB’s goal to make workforce development services more customer-centered.

### TIMELINE

The timeline below lists the activities related to the Customer Referral System. This timeline is subject to change and all times are Pacific Time (PT).

Milestone	Date
RFP Release	February 14, 2025
Deadline for Vendor Questions	February 28, 2025 (5:00 PM PT)
Responses to Vendor Questions to be Posted by	March 5, 2025
Proposal Submission Deadline	March 10, 2025 (5:00 PM PT)
Proposal Evaluation Period Begins	March 11, 2025
Shortlist of Vendors Finalized by	March 18, 2025
Vendor Presentations/Demonstrations	March 12-21, 2025
Final Evaluation and Selection by	March 25, 2025
Notification of Award by	March 26, 2025
Contract Negotiation Period	March 24 to April 2, 2025
Project Kickoff	March 24 to April 7, 2025

#### Notes

1. **Vendor Questions Deadline:** This provides vendors with ample time to clarify project requirements or address uncertainties before submitting their proposals.
2. **Evaluation and Demonstrations:** Allows sufficient time for reviewing submissions and conducting vendor presentations or demos to assess capabilities.
3. **Contract Negotiation:** Provides a buffer to finalize terms and ensure a clear understanding between the chosen vendor and EOWB.
4. **Project Kickoff:** Allows time for onboarding and planning while ensuring progress aligns with organizational goals.

### ELIGIBLE RESPONDENTS

Entities eligible to respond to this Request for Proposal (RFP) must have expertise in developing, implementing, and supporting technology-based solutions. Respondents may include:

- **Technology Providers:** Non-Profit, Universities, and for-profit companies or organizations specializing in software development, cloud-based platforms, or similar technologies with proven experience in customer referral systems, case management, or database solutions.

Respondents must demonstrate the capacity to meet the scope of work outlined in this RFP and provide examples of past projects that align with the deliverables. Preference may be given to respondents with experience in secure, scalable technology platforms designed for workforce systems, or similar applications.

## **SECTION II: BACKGROUND**

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### **EOWB navigator project goals:**

- **Analyze and Act on Data:** Gather and interpret data to identify actionable insights to improve service delivery and customer outcomes.
- **Streamline Referrals and Support:** Ensure customers are connected to the appropriate resources, both within WorkSource Oregon (WSO) centers and through partner organizations.
- **Ensure Access:** Ensure easy access to services across all communities and ability levels.
- **Enhance Staff Support:** Equip staff with real-time tools and information, such as through the implementation of systems to improve efficiency and service quality.
- **Foster Strategic Planning:** Use data-driven insights to inform long-term planning and investments, ensuring that WSO centers remain responsive to evolving community needs.

By addressing these project goals and implementing effective strategies, WSO centers can evolve into dynamic career hubs that not only meet the immediate needs of job seekers but also contribute to the long-term economic resilience of eastern Oregon.

### **The Eastern Oregon Workforce Board and the Public Workforce System**

The Eastern Oregon Workforce Investment Board (EOWB) is a 501 (c)(3) non-profit organization focusing on workforce development in the eastern Oregon area, which includes Baker, Grant, Harney, Malheur, Morrow, Umatilla, Union, and Wallowa counties. As the designated local workforce development board, EOWB oversees and coordinates the public workforce system within the eight-county area. The oversight and administration of workforce services for the area is chartered to EOWB in partnership with the Eastern Oregon Jobs Council (EOJC), an intergovernmental jurisdiction made up of a County Commissioner from each of the eight counties. EOWB works on behalf of and in coordination with the EOJC.

The cornerstone of the eastern Oregon area's workforce system is the one-stop service delivery system that aids in the needs of dual customers: job seekers and employers. This delivery system is the mechanism through which programs and services are integrated within each community. In Oregon, this one-stop system is referred to and branded under the name WorkSource Oregon (WSO).

The mission of WSO is to effectively respond to workforce challenges through high-quality services to individuals and businesses, resulting in job attainment, retention, and advancement.

## ***SECTION III: Scope of Work***

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### **Objective**

To create a streamlined referral system that enables the efficient transfer of customer requests with and between service providers within local communities and across Oregon, while maintaining customer privacy. This system will facilitate smooth handoffs between community partners, ensure timely follow-up, and improve customer access to services.

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### **System Deliverables**

#### **Sharing Customer Referrals Between Service Providers**

##### **1. Service Provider Database Creation and Maintenance**

- Develop an easily accessible, updatable database of service providers.
- Enable new organizations to create organization and contact profiles with location data (county, city) and service categories (e.g., food, job search, training).
- Implement search and match functionality for case workers and for customers to connect with relevant providers.
- Enable customers to create accounts and request services from organizations in their area within the system.
- Include the ability to share limited information with different user levels.

##### **2. Enhanced Customer Profile Information**

- Add fields/forms within the customer profile for:
  - Customer identification and basic contact information (name, address, phone number, and email address).
  - Individual Employment Plan (IEP): Allow case workers to input information directly into fields/forms that can be shared with other service providers, upon customer approval.
  - Future Case Transfer Date and future Address for customers, if applicable.
  - Open field for case worker notes that help provide context for referrals, viewable only to the customer and authorized case workers.

##### **3. Case File Sharing and Transfer System**

- Designate options to “Share” a file (add joint access) or “Transfer” a file (transfer access to the new case worker and relinquish access of previous case worker).
- Enable location-based searches for identifying partner organizations by city, county, or zip code.
- Set up instant access for the receiving case workers upon case-sharing or transfer, allowing them to schedule appointments and review customer information promptly.
- Automatic notification triggers at key stages and/or dates for:
  - Cases involving customers nearing expected case transfer date.
  - Reminders for receiving case workers to schedule appointments as case transfer dates approach.
- Create different levels of information sharing to protect customer information.

#### 4. Status Updates and Notifications

- Implement a status-monitoring feature to label actions such as:
  - Transfer Initiated, New Case Worker Added, Transfer Requested, Transfer Completed.
- Send notifications to customers and relevant case workers for status changes and transfer completions.
- Enable Transfer Completed status to be updated directly from an email notification received from the system.
- Schedule reminder notifications for key milestones, such as appointment scheduling for customers nearing case transfer date.
- Send notifications when referrals are sent and not marked completed within a pre-determined timeframe.

#### 5. Cross-Agency Sharing Requests

- Enable new case workers to request access to an existing customer file from the primary case worker, with approval managed either by the customer, the original case worker, or both.
- Track request statuses as Transfer Initiated, Requested, or Completed, and send notifications for status changes.

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### Customer Self-Referrals to Local Services

#### System Deliverables:

##### 1. Self-Service Provider Database

- Allow customers to search for local services by location and service category, using the database created for referrals between case workers.
- Enable customers to view a list of local providers and request services directly.

##### 2. Service Request and Follow-Up

- Allow customers to request a service provider to contact them directly.
- Track and update service request statuses (e.g., Request Initiated, Received, Under Review, Referral Complete).
- Send notifications to relevant providers and update the status as service requests progress.

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### Dashboards for Case Tracking and Customer Follow-Up

#### System Deliverables:

##### 1. Dashboard Checklist and Task Management

- Develop a dashboard to track task completion, pending actions, and follow-up items for both customers and case workers.
- Visually highlight incomplete or overdue tasks to help prevent missed follow-ups.

##### 2. Status Tracking for Customer Cases

- Create visual status indicators to show referral status for case workers and customers, ensuring transparent and efficient referrals.

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## **Appointment Scheduling**

### **System Deliverables:**

#### **1. Appointment Scheduling Integration**

- Add appointment scheduling capabilities within the system, enabling case workers and customers to set, view, and manage appointments easily.
- Implement reminders and notifications for upcoming appointments to encourage attendance.

## **SECTION IV: SUBMISSION INFORMATION AND REQUIREMENTS**

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### **COMMUNICATION**

EOWB's website will be used as the primary mode of communication between EOWB and potential bidders. Beginning **February 14, 2025**, interested parties can download the Request for Proposals at <http://www.eowb.org>. Bidders may submit additional questions in writing to [info@eowb.org](mailto:info@eowb.org) through February 28, 2025 (5:00 PM PT). All questions and their answers will be posted on EOWB's website by March 5, 2025. It is the bidders' responsibility to view the website frequently to stay connected and apprised throughout the process. Questions received after **February 28, 2025 (5:00 PM PT)** will not be acknowledged.

### **CONTACT WITH BOARD MEMBERS OR STAFF**

To avoid conflicts of interest, the appearance of conflicts of interest, or undue influence over the process, all potential bidders to this RFP are prohibited from contacting Board members, EOWB staff, or members of the Eastern Oregon Jobs Council regarding this solicitation. **Violations may result in the rejection of the related proposal.**

### **SUBMISSION**

EOWB must receive the proposal and all related documents **no later than 5:00 PM (PDT) on March 10, 2025**. Proposals not received by this time will be automatically disqualified from competition - **no exceptions**.

Bidders will provide either an electronic copy or a paper copy of the complete proposal. Either copy, paper or electronic, of the proposal must be provided to EOWB by the timeframe stated in this proposal.

Electronic copies of the proposal must be sent to [info@eowb.org](mailto:info@eowb.org). The documents listed above must be submitted as a single PDF file.

Paper copies should be delivered to 1215 Adams Avenue, Suite B, La Grande, Oregon 97850 and must be RECEIVED by the due date.

### **WITHDRAWAL**

A submitted proposal may be withdrawn prior to the proposal due date. A written request to withdraw the application must be submitted to EOWB. If a bidder does not withdraw a proposal by the due date, the proposal becomes the property of EOWB and may be subject to public disclosure per the Freedom of Information Act.

### **APPEALS**

Appeals can only be submitted if a party believes EOWB did not follow the process outlined in the RFP. Appeals may not be submitted in contention with the score, outcome, or awards of the RFP. Any bidder who wishes to contest the process of the award of funding under this RFP, must write to EOWB within seven (7) days of notice of funding award. EOWB will issue a decision on appeals within 30 days of receipt.

E-mail Appeals to [info@eowb.org](mailto:info@eowb.org).



## **SECTION V: PROPOSAL CONTENT**

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The proposal must clearly demonstrate the respondent's ability to provide the requested services. A responsive proposal is one that complies with the format and content requirements of this RFP. To simplify the review process and facilitate a meaningful comparison, proposals must contain the following documents in the order listed below:

### **1. Organizational Documentation**

- Documentation must be provided to demonstrate the respondent's legal, financial, and operational qualifications (e.g., articles of incorporation, 501(c)(3) designation letter).
- Page Count: No page limit.
- Evaluation: Pass/Fail.

### **2. Proposal Narrative**

The narrative must provide a detailed explanation of how the respondent plans to fulfill the deliverables outlined in the RFP. It should address the following areas:

- Executive Summary:
  - Provide a concise overview of your proposed solution, including key features.
  - Evaluation: Pass/Fail.
- Administration (20 Points):
  - Describe your organizational capacity to manage this project, including key personnel, project management methods, and risk mitigation strategies.
  - Highlight your approach to ensuring compliance with data security, privacy standards, and accessibility requirements.
- Experience and Approach (60 Points):
  - Detail your organization's experience with similar projects, including examples of previous work related to referral systems, case-sharing systems, or workforce development platforms.
  - Explain your technical approach to meeting the deliverables outlined in the scope, including development methodologies, tools, and timelines.
  - Highlight how your system aligns with the goals of improving collaboration, efficiency, and customer outcomes.

### **3. Development Budget Form**

- Requirement: Submit a completed budget form detailing the costs associated with developing and implementing the system.
- Evaluation: 20 Points.

### **4. Proposal Formatting**

All parts of the Proposal Narrative must contain a footer that includes the page number and organization name and follow the formatting in the table below:

Font	12 point, Calibri
Margins	One (1) inch for all margins
Spacing	Normal Spacing Styles

## SECTION VI: EVALUATION AND SELECTION

Proposals will be reviewed for compliance with the specifications of this RFP through the following:

- **Technical Feasibility:** How well the solution meets scope requirements, and the below evaluation criteria table.
- **Experience and Capacity:** Relevant past projects and ability to deliver.
- **Cost-Effectiveness:** Value offered for the proposed budget.
- **Customer Support:** Post-launch support and training plans.

Use this table to identify requirements that will be met by your solution. (Place an X in each appropriate box)

Evaluation Criteria	Meets	Partially Meets	Does Not Meet	Comments
<b>Service Provider Database</b>				
- Easily accessible and updatable database				
- New organization profile creation (location/service categories)				
- Search and match functionality for providers				
<b>Enhanced Customer Profile Information</b>				
- IEP (Individual Employment Plan) input/upload				
- Fields for release date/address (incarcerated customers)				
- Open field for case worker notes				
<b>Case File Sharing and Transfer System</b>				
- "Share File" (joint access) or "Transfer File" (sole access) options				
- Location-based search for partner organizations				
- Instant case worker access upon file sharing				

<b>Evaluation Criteria</b>	<b>Meets</b>	<b>Partially Meets</b>	<b>Does Not Meet</b>	<b>Comments</b>
- Automatic notifications for milestone actions				
<b>Status Updates and Notifications</b>				
- Status-tracking system (e.g., Transfer Initiated, Completed)				
- Reminder notifications for key milestones				
<b>Cross-Agency Sharing Requests</b>				
- New case worker request access functionality				
- Status tracking for sharing requests				
<b>Customer Self-Referrals</b>				
- Self-service provider database for customers				
- Direct service request functionality for customers				
- Status updates for service requests				
<b>Dashboards for Case Tracking</b>				
- Dashboard for task tracking and follow-ups				
- Visual status indicators for case progress				
<b>Appointment Scheduling</b>				
- Appointment scheduling integration				
- Appointment reminders and notifications				

## ***SECTION VII: PROVISIONS & DISCLAIMERS***

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- EOWB reserves the right to withdraw this request from publication at any time.
- EOWB reserves the right to waive informalities and minor irregularities in offers received.
- This RFP does not commit EOWB to award a contract.
- EOWB may accept any item or group of items of any offer, unless the bidder qualified its offer by specific limitations.
- EOWB reserves the right to request additional data or oral discussion or documentation in support of written offers.
- No costs will be paid to cover the expense of preparing a proposal.
- All data, material, and documentation originated and prepared by the bidder pursuant to the contract shall belong exclusively to EOWB and be subject to disclosure under the Freedom of Information Act. Applicants are advised that most documents in the possession of EOWB are considered public records and subject to disclosure under the State of Oregon's Public Records Law.
- Formal notification to award a contract and the actual execution of a contract are subject to the following: Receipt of anticipated funding, results of negotiations between selected bidder and EOWB staff, and continued availability of funds.
- Proposals submitted for funding consideration must be consistent with – and if funded, operated according to – relevant federal legislation, all applicable federal regulations, State of Oregon policies, and EOWB policies and procedures.
- Additional funds received by EOWB may be contracted by expanding existing programs. These decisions shall be at the discretion of EOWB.
- EOWB may decide not to fund part or all of a proposal even though it is found to be in the competitive range, if in the opinion of EOWB, the services proposed are not needed, or the costs are higher than EOWB finds reasonable in relation to the overall funds available, or if past management concerns lead EOWB to believe that the bidder has undertaken more services than it can successfully provide.
- EOWB has a right to fund a lower-ranked proposal over a higher ranked proposal because of valid policy considerations, including but not limited to, geographical considerations, leveraging of outside resources, and target populations.
- All bidders must ensure compliance with the Nondiscrimination & Equal Opportunity Assurance (29 CFR Part 37) and all Federal statutes relating to nondiscrimination. No individual shall be excluded from participation in, denied the benefits of, or subjected to discrimination under any WIOA-funded program or activity because of race, color, religion, sex, national origin, age, disability, or political affiliation or belief.
- All bidders must ensure access to individuals with disabilities pursuant to the Americans with Disabilities Act.
- EOWB reserves the right to determine both the number and the funding levels of contracts finally awarded. Such determination will depend upon overall fund availability and other factors arising during the proposal review process. The proposal warrants that the costs quoted for services in response to the RFP are not in excess of those that would be charged any other individual for the same services performed by the bidder.