



مؤسسة نهر الأردن
Jordan River Foundation

REQUEST FOR PROPOSAL

Case Management system

RFP #: JRF-P-2020-021 - Case Management system

Issue Date: September 15, 2020

This is the official document of Jordan River Foundation providing a Request for Proposal (RFP) to procure the services of a specialized service provider who meets JRF requirements for developing a case management system.

The Case Management System is a web-based system that manages the contact information of the callers and will be used by our national helpline system dedicated for family & child consultation services offered by Jordan River Foundation.

The software will consist on multiple modules that reflects the business requirements were each module has its own reporting and operations.

Issuance of this RFP in no way obligates Jordan River Foundation to award a contract, or commit it to pay for costs incurred in the preparation and submission of the proposal. Furthermore, Jordan River Foundation reserves the right to reject any and all offers, cancel the solicitation, or to award multiple bidders without prior notice, if such an action is considered to be in the best interest of the Foundation.

The timeline for the activities under this RFP is:

Description	Date
Distribute documents to offeror(s)	September 15, 2020
Deadline for questions and clarifications	September 17, 2020
Deadline for offeror(s) to submit proposals	September 24, 2020
Anticipated Start Date: <i>(Start date is subject to change)</i>	October 2020
Anticipated Period of Performance:	(2) Months

Confidentiality

All material and information submitted by Jordan River Foundation must be treated as confidential and not used for any other purpose than the response to this RFP. Information submitted by any service provider/consultant will be considered and treated as confidential by Jordan River Foundation and any consultants acting on behalf of Jordan River Foundation.

1. INTRODUCTION

Jordan River Foundation (hereinafter referred to as “JRF”) is seeking proposals from interested, qualified, and experienced providers for a new system implementation project. Tasks included in the scope of work in this RFP represent the minimum requirements to undertake the assignment. Additional tasks, as a result of good understanding of key issues may be included in the provider’s proposal.

The selection of the provider will be based on factors such as: previous working experience and history in performing the aforementioned service, technical approach and methodology, comprehensiveness of the proposal, proposed fees, CVs of experts, in addition to the engine & timeframe provided.

Shortlisted consultants/firms might be asked to present their proposals to JRF’s Technical Committee. Accordingly, JRF shall determine the most responsive and responsible consultant/firm providing the best service at the most reasonable cost, and based on the evaluation criteria set below.

The service provider must be free from actual conflicts of interest not only at the time of selection, but throughout the term of the contract as well.

2. BACKGROUND

The Jordan River Foundation (JRF) is a Jordanian non-profit, non-governmental organization established in 1995 and Chaired by Her Majesty Queen Rania Al Abdullah. JRF works in communities adopting a multi-stakeholder approach that encourages community ownership and proactive involvement of all stakeholders; be it community members, Community Based Organizations (CBOs), local government, youth and women, striving to explore solutions to create sustainable and resilient communities.

JRF celebrates its 25th anniversary this year, marking over two decades of social, economic and cultural interventions that have enhanced the lives of hundreds of thousands throughout the Kingdom. JRF has two main programs - Community Empowerment (CEP) and Child Safety (CSP) programs; in addition to an established Training & Consultancy Division that transfers all the tested models and best practices from both programs and the Handicrafts Design Project, JRF's leading women empowerment project. JRF operates across Jordan (North, Middle, and South), through 8 JRF centers, offices, and showrooms. JRF employs 309 qualified staff with the expertise to successfully manage its operations. JRF is governed by a Board of Trustees that is chaired by Her Majesty Queen Rania Al Abdullah.

Our Vision

A Jordan where solutions are home-grown, where the opportunity to prosper is for all, and where the well-being of our children shapes our future.

Our Mission

To engage Jordanians to realize their full economic potential and overcome social challenges especially child abuse.

Our Approach

Since inception, the Foundation has initiated numerous socio-economic projects for women, children and people who are in need of help which aim to provide employment opportunities that in turn enhance their livelihoods. In tandem, these projects also work towards to enhancing the targeted population knowledge and skills in the production of traditional handicrafts, and in entrepreneurial skills.

By integrating and serving community development needs, the Foundation is now recognized nationally, regionally and internationally as an agent for positive change.

3. ELIGIBILITY

The requested services shall be provided by a professional provider, hereinafter referred to as “offeror” or “service provider”. “Offer” and/or “Proposal” means the package of documents the offeror submits in response to this RFP.

If the offeror is a firm, it must be a legally registered entity.

4. SCOPE OF WORK / REQUIRMENTS

The case management system is a web & mobile based system that manages the contact information of the callers and will be used by our national helpline system dedicated for family & child consultation services offered by Jordan River Foundation.

The software should have a fully managed data security & application security levels based on users and the roles assigned to, as the data stored in the system is considered classified.

The software will consist on multiple modules that reflects some of our business requirements below, each module has its own reporting and processes:

- **Incident / Caller Management module:** this module is basically to collect all the information provided by the caller to report a specific case, each incident should pass through a predefined workflow and registered. The information collected from the caller will be stored and treated as a fixed record for the beneficiary to have a full database of the callers and all his/her incidents.
- **Online consultation requests:** The online consultation request module will be used by the beneficiaries to contact the helpline and ask for consultation services, the services will be categorized based on the beneficiary request, and will be dealt with in the backend of the system by the supervisor as an incident. – this module will be discussed briefly after the awarding of the vendor

Third Party (External Consultation) Module: This module will be used to transfer the cases to third party entities that will manage the cases and its incidents in case the beneficiary needed external consultation (for example we send the beneficiaries to Ministry of education). – this module will be discussed briefly after the awarding of the vendor

- **Internal Consultation (Referrals):** the incident or the case will be sent to another employee for consultation, this will be briefly explained below
- **Admin Panel:** the system needs to have an admin panel that manages all the cases and the workflows, and will also manage the internal and the external users
- **Social Media & chatting tool Module:** This module is used to integrate the system with the social medial platforms and a chatting tool will also be used to contact the helpline agents using our chatting application mentioned in point number two & integration with Whats app / Facebook social media platforms



- **Reporting module:** this module will have all the reports needs for the application, we will not mention the count however we want reports for each aspect of the system and will be negotiated during the implementation
- **Services Workflow management module:** this module is basically a customized services module that the supervisor can edit the services workflow and assign it to a specific beneficiary

Specific system requirements:

1. Mobile application that the beneficiary uses to contact the helpline seeking for consultation:

- Online Chatting tool to contact the helpline agents, with a feature to reply to each request and to integrate the user information with the case management and categorize the request.
- The user can view his requests and see the replies from the supervisors or agents
- Each user will have his own profile that shows all the case requests
- The Beneficiary can login anonymously or login using social media
- The supervisor can call the beneficiary from the mobile application without sharing his information

2. incident Management workflow system:

- Workflow engine that have all the Workflow features
- We prefer a ready-made case management system
- Integrate with Avaya Call center
- Integrate with SMS gateways
- Fax module.
- Web based
- Mobile application.

5. TECHNICAL PROPOSAL

The offeror's technical proposal must include the following:

- **Bidder(s) Qualifications**

The proposal must describe the Bidder's qualifications to conduct the RFP scope of work activities, including his/her expertise, knowledge, and experience. Experience should include



examples of conducting similar or related work. The proposal should provide the name, title, address, telephone number and email address for each person engaged in the activity scope. Further, if a consultancy group or partnership of consultants is proposed to conduct the RFP scope of work, the proposal must indicate which activities each consultant will conduct, as well as information about their level of expertise, knowledge and experience to conduct those specific activities.

- **Scope of proposal**

- The proposal must demonstrate an understanding of the project objectives and desired results.
- The proposal must illustrate an approach to the scope of work that will likely lead to the successful development of an actionable strategic plan.
- The proposal must illustrate the consultant's ability to successfully execute the proposed approach.
- The proposal must include an appropriate process to interact with JRF stakeholders.

- **Work Plan**

- The proposal must contain a detailed description of the activities to be conducted by the consultant in order to complete the requested scope of work, including:
 - The specific activities to be conducted at each stage,
 - A detailed timeline for the activities at each stage,
 - Milestones and deliverables tied to those activities, and

- **Previous Work Experience**

To the maximum extent possible, the proposal shall include at least two examples of written work for similar developed works.

6. COST PROPOSAL (Must be submitted separate from technical proposal).

Cost Overview

- The offeror is requested to detail how rates are applied.
- Items not included in the budget but forming part of the service for the satisfactory completion of the project, shall be deemed to be free issue to Jordan River Foundation.

- Offeror's proposal should be valid for a 90-day period from the response deadline date. Prices must therefore anticipate and include any price adjustments, which may be in the pipeline quoted for.
- The offeror shall clearly state any assumptions made which have a material effect on the prices submitted.
- A detailed budget for each stage, along with a proposed payment schedule tied to project milestones and/or deliverables.
- **Bidders applying to this tender must submit a bank guarantee with 1% of the total value of the bid valid for 90 days.**
- **Awarded bidder(s) will be asked to submit a performance bond.**

7. RESPONSE PROCEDURES

General observations and conditions of RFP

- a. The offeror should be aware of the following points when submitting their response to this RFP:
- b. It is the offeror's responsibility to ensure that all the information necessary to permit the preparation of the response has been provided in sufficient detail and in sufficient time.
- c. No claims as to lack of clarity of information concerning the services within the RFP documentation shall be accepted. It is the responsibility of the offeror to seek such clarity if it is required.
- d. The offeror must ensure that they are fully aware of all information required in order to provide a complete response with accurate costs. It is the responsibility of the offeror to ensure that the requirements comprised within the RFP are clearly understood prior to the submission of their response.
- e. The requirements and specification detail within are not to be altered in anyway by the offeror. If the offeror wishes to propose modifications (which the offeror may consider to provide a better way to achieve the proposal objectives) these will be considered as an alternative offer. The offeror must make alternative offers in a separate letter to accompany the response. Jordan River Foundation is under no obligation to accept alternative offers.
- f. The offeror's response document must address in full all of the requirements for all services that will be provided during the term of the contract.



- g. The offeror will accept full responsibility for actions arising from information misinterpreted or misunderstood by the offeror or for any errors or omissions thus caused.
- h. A response may be rejected if the offeror does not furnish all the information required in this RFP.
- i. The offeror is advised that nothing in this RFP or in any other communication made between Jordan River Foundation and any other party, or any part thereof, shall be taken as constituting a contract, agreement or representation between Jordan River Foundation and any other party (unless a formal award of contract is made by Jordan River Foundation).
- j. Jordan River Foundation does not accept any responsibility for any pre-contract representations made by it or on its behalf, or for any estimates by the offeror of resources to be employed in meeting Jordan River Foundation's requirements or for any other assumption the offeror may be drawn or will draw from any pre-contract discussions.
- k. Jordan River Foundation accepts no liability to pay for any proposal or other preparatory work undertaken in connection with this RFP.
- l. All offerors are advised that Jordan River Foundation is not committed to any course of action as a result of issuing this RFP and/or receiving responses from the offerors in respect of the RFP. In particular, it should be noted that Jordan River Foundation may reject any response, which does not conform to any instruction or specification in this RFP. It should also be noted that Jordan River Foundation will not accept responses after the closing date without prior formal agreement or may not accept any or all proposals if Jordan River Foundation so decides. Jordan River Foundation reserves the right to discuss or clarify the offer with the offeror at a later date. Jordan River Foundation also does not commit to accepting the lowest price of any response.
- m. The proposal supplied by the offeror shall include all costs involved in the provision of the service specified in this RFP and the offeror may add no other costs after the response has been submitted.

8. Evaluation criteria

Jordan River Foundation is interested in obtaining a complete service to the requirements contained in the RFP. Proposals that meet the RFP instructions and requirements will be given a thorough and objective review.

Jordan River Foundation will evaluate proposals according to the following criteria:

Evaluation Criteria	Score
Quality of proposed plan, details & Creativity of implementation	30%
Compliance to requirements of the RFP	20%
Previous Work Experience	20%
Cost Reasonableness and Competitiveness	30%
Total	100%

Only proposals that have passed the technical evaluation with a minimum technical score of 50 out of 70 will be carried forward to the cost evaluation.

These will be the main award criteria; however, this will not preclude the offeror from placing emphasis on other subjects that also deem to be important.

9. RFP responses

- Offerors must confirm receipt of this document within 48 hours by email to Procurement@jrf.org.jo.
- Should the offeror wish to respond to this RFP, they are required to formally acknowledge receipt of this RFP document and also acknowledge acceptance of the conditions specified herein.
- The response to this RFP must include two separate documents consisting of a Technical proposal and a Cost Proposal
- Proposals, all documents and all correspondence relating to this RFP must be written in English.
- Submissions should be delivered in the formats and to the address detailed below by no later than **12:00 on September 24, 2020**. Receipts will be provided on request.
- The responses to the RFP document MUST be supplied **in paper form (BY HAND)**. Delivery details can be found below.



مؤسسة نهر الأردن
Jordan River Foundation

Paper submissions must be delivered through same form of registered service (courier is recommended) within sealed envelope(s) addressed to:

Procurement & Logistics Manager

Jordan River Foundation

Masoud Bin Sa'ad Street

Al Rawnaq Area

Amman, Jordan

Tel: +962 6 593 3211

- On the front of the envelope(s) below the address also write: "Request for Proposal, Response to RFP # JRF-P-2020-021, to be opened by addressee only"
- Offeror must ensure that the courier service obtain signature for receipt of delivery.

END OF DOCUMENT