



**Child Development Associates, Inc.**

*Our Mission is to encourage and support the success and well being of children, families and the child care community...*

## **Child Development Associates Inc.**

### **Request for Proposal**

#### **Procurement of an Electronic Signature (e-Signature) Solution**

##### **PURPOSE:**

The purpose of this Request for Proposal (RFP) is to solicit applications from qualified vendors for the procurement of electronic signature solutions for Child Development Associates Inc. (CDA).

By acquiring and implementing an e-signature solution, CDA will be able to provide customers access to documents that they can securely complete and sign from anywhere, at any time and on any internet enabled device. By incorporating e-Signature solution into the business workflows and processes CDA is expecting to improve business agility, service to our families and provide, personal accountability and compliance.

##### **SPECIFICATIONS:**

The proposed e-Signature solution must:

- Comply with Government Code section 16.5. The vendor must specify in their application how they comply with this regulation.
- Support multiple languages.
- Accommodate multiple platforms (Windows, Mac, OS, IOS, Android etc.) form factors (desktop, laptop, tablets, smartphones, etc.) and work with major internet browsers (Chrome, Firefox, Edge, Safari, etc.).
- Allow recipients to receive an email link on any internet-enabled device that allows them to access the document and complete the signing process.
- Be able to link/integrate the e-signature software to our CC3 software and Microsoft Office programs for a seamless user experience with no additional software purchases required.
- Be able to easily upload documents, add the names and email addresses of signers and other recipients, and specify the order in which the document should be signed.
- Differentiate who takes what actions (color coded) to ensure recipients sign/enter the correct information.
- Have the ability to designate required fields in the document to ensure all information is recorded.
- Be able to customize and expand forms, drag and drop required fields to indicate where signatures are required and add standard or custom fields for signers to enter information.
- Be able to accept PDF documents as templates for customization.
- Have the capability to use Optical Character Recognition (OCR) technology to apply pre-existing templates to any uploaded form based on preset similarity threshold.
- Include but not limited to the following standard fields:

180 Otay Lakes Road, Suite 300  
Bonita, CA 91902  
tel: 619.427.4411  
fax: 619.434.5323

- Signature
  - Initials
  - Date Signed
  - Name
  - Email
  - Text
  - Checkbox
  - Dropdown
- Have specific format verifications for example SSN, email, telephone number and custom formats.
  - Have the ability to set daily automatic reminders for signers and be able to set expiration date for signature request on time sensitive documents.
  - Include a document management dashboard capable of but not limited to the following features:
    - Create a work flow and assign users to sections of the process
    - Configurable multiple levels of access to each document via permission based controls
    - View and track all documents sent including those completed, expiring soon and pending completion
    - Run reports, see audit trails and receive notifications at every step of the process
  - Be able to customize outgoing emails to CDA branding and display thank you screen after the signer has completed the document.
  - Store all signed documents on a secure platform with 24/7 user access. CDA will be able to download and printed stored documents as needed.
  - Allow CDA full control of the operation of the proposed solution after its deployment is implemented.
  - Be able to scale in terms of use and cost. Organization wide implementation will be based on a staggered rollout plan among departments. The e-Signature Solution will be implemented and tested one department at a time until its eventual deployment is implemented system-wide.
  - Be able to be utilized by all departments without requiring significant changes to our business processes.
  - Be fully implemented and operational by April 1<sup>st</sup>, 2019.

**HOW TO APPLY:**

Please submit the following via email to [procurement@cdasd.org](mailto:procurement@cdasd.org) no later than 5 PM on December 31, 2018.

1. Cover letter that should include:

- |                                 |                        |
|---------------------------------|------------------------|
| • Name of organization          | • Contact email        |
| • Address of organization       | • Contact phone number |
| • Contact person name and title |                        |

## 2. Narrative

- a) Brief background of your organization.
- b) Summary of relevant experience with projects of this scope and nature.
- c) Summary of why your organization is interested in this project and what unique or value-add qualities you can offer.
- d) Overview of how your organization can meet our needs based the requirements outlined in the specification.

The RFP contains sufficient information and instructions to enable qualified bidders to prepare and submit proposals and supporting material. To be considered responsive, vendors must submit a complete bid that satisfies all requirements as stated in this RFP.