![Feeding America logo]

Service Insights Initiative

Technology Buyer's Guide

Last Updated April 2018

Prepared by:
Data Blueprint and Feeding America

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Service Insights
Technology Buyer's Guide

1. Overview

The goal of the [Service Insights Initiative](#) ↗ (formerly known as Client Data Tracking) is to support network members interested in implementing electronic data software to collect information from the people they serve through partner agencies and/or through direct distribution programs. The key output of this initiative is a guiding [Network Framework](#) ↗ that highlights distinct phases of work for implementing and maintaining a service insights program, along with accompanying tools and resources. As part of the [Select Phase](#) ↗ of the Network Framework, this Technology Buyer's Guide has been prepared as a resource for food banks to assist them in selecting a software vendor. Interested members should also review the [Vendor Considerations](#) ↗ tool to identify additional questions of interest when contracting with a technology vendor.

This guide is not a comprehensive list, but rather, a summary of responses from vendors who completed an RFI (Request for Information) sent out by Feeding America through the initiative. This guide provides background, pricing, support and product information on several leading software providers in the industry. The guide also lists any references as offered by the vendor. The guide is a positive step forward for member food banks to make their own selection for the software provider that best accomplishes the goals of their organization and partner agencies previously identified in the [Plan Phase](#) ↗.

The Service Insights Initiative has been carried out through the collaborative efforts of member food banks and partner agencies, a Member Advisory Group, Feeding America national office staff, industry experts, learning partners, and Data Blueprint, who contributes expertise in data management.

These summarized RFI responses (as of April 2018) are for information only, and are not responses to a Request for Proposal or quote. The preceding RFI was issued solely for information and planning purposes and does not constitute a solicitation or an obligation on the part of Feeding America or the network of food banks and partner agencies to acquire any products or services. Feeding America will update the guide twice a year through the formal RFI response process. If you are interested in receiving updated copies of the guide, please join the Service Insights Interest Group by emailing research@feedingamerica.org.

Vendors may have updated their offerings since the issuance of this RFI; consequently, we encourage you to contact vendors directly to confirm the most recent offerings.

2. Revision History

The revision history section is to provide last dates of feedback and updates to the buyer's guide from the various vendors. Vendors are presented in alphabetical order.

Vendor	Last Updated
Link2Feed	04/2018
Minute Menu	09/2017
Oasis Insight	08/2017
Salesforce.org	08/2017
Social Solutions Global – Apricot/Efforts to Outcomes	09/2017
Sox Box Software LLC. – FoodBank Manager	04/2018
Virtual Case Manager	08/2017

3. Summary Matrix

Vendors are presented in alphabetical order. For additional details on each vendor and feature, reference the full description contained in this guide. Vendors may have updated their offerings since the issuance of this RFI; consequently, we always encourage you to contact vendors directly to confirm the most recent offerings.

Note: Checkmarks denote a feature offered by that specific vendor for that product.
† Functionalities recommend by member food banks based on pilot experience.
BAA: Business associate agreement

	Link2Feed	Minute Menu	Oasis Insight	Salesforce	Social Solutions Apricot	Social Solutions Efforts to Outcomes	Sox Box FoodBank Manager	Virtual Case Manager
Programs Supported	Pantry, TEFAP Pantry, Meal Programs, School Pantry, CACFP, SFSP, SNAP Outreach, CSFP, Custom Programs	CACFP (including Kids Cafe), SFSP. Online Child Enrollment module is available	Pantry, Meal, Assistance, CSFP Module, TEFAP/EFAP/SFPP Module, SNAP Applications, SNAP Events, Outcomes, Referrals	Marketing, Fund Raising, Client Tracking, Agency Tracking	Pantries, distribution of meals, child/youth programming, employment programs	Pantries, distribution of meals, child/youth programming, employment programs	Pantry, Seniors, Children, Meals, Home Delivery, Mobile Pantry, Donations, Volunteer Time, Clothing, Financial Assistance	Pantry, Meal, Custom Services, Individual or Group Reporting, Referral System, Collaboration Services
Price / Licensing Cost	Monthly: Pantry: $12+/site/month Kids Cafe: $25/site/month Inventory: $12+/site/month CSFP: 9+/site/month SNAP: As low as $50/month	$450 per license (one-time fee)	As low as $8/month per pantry	10 free user licenses; incremental users are $432 per user per year	Starts at 10 users at $590/user annually	Licensing offered in blocks of 20 sites/agencies Initial block - $48,000 Each additional block - $20,000 Total estimate for food bank with 50-75 agencies each is $89,000-$108,000 annually	$24.95 per month for the Domain + one site license $20 per month additional site licenses 10+ site licenses – bulk discount available (call for pricing)	Licensed per Workstations: • 1-2 - $400 /year • 3-5 - $460 /year • 6-9 - $580 /year • 10-14 - $700 /year • 15-20 - $820 /year
Installation / Initial Set-up Cost	$499+ (Quoted based on Agencies)	$450 annual software maintenance fee (annual fee)	No setup fees	Included in the licensing fee	Initial set-up starts at $2,950	Implementation costs dependent on project scope. Projects are billed at a $200/hr rate. Hours are estimated prior to project start and billed as Time & Materials (T&M).	None	$300

This tool is part of the broader Service Insights Network Framework

	Link2Feed	Minute Menu	Oasis Insight	Salesforce	Social Solutions Apricot	Social Solutions Efforts to Outcomes	Sox Box FoodBank Manager	Virtual Case Manager
Maintenance Costs	Included in licensing fee	$39/month/site if claim data is entered for a site, regardless whether submitting for reimbursement. $7.50/month/site if site was active, but did not record claim data for a month. Non-claim features include child enrollment and menu production.	Included in licensing fee	First 10 user licenses are free – incremental licenses are $360 per user per year for Salesforce Sales Cloud Enterprise Edition (Foundation Enterprise Edition)	Ongoing maintenance included in the licensing fee	Starts at 20 users @ 900 per user/annually (per user discounts apply as the number of users increases)	Included in licensing fee	Included in licensing fee
Licensing Structure	By program or agency, no restrictions on number of user accounts	By program or agency No restrictions	By agency Volume discount and "unlimited" pricing options available upon consultation No restrictions	First 10 licenses are free Licenses are provisioned by user or by login count No restrictions	Number of licenses align with those purchased	Pricing for a collaborative of agencies working together on the platform is offered in blocks of 20 sites (agencies) for an annual license	By location (unlimited users per location)	Based on number of workstations using VCM within an agency Special pricing for groups of collaborating agencies
Customization Cost Structure (e.g., Data Imports)	150/hour for standard projects. $200/hour for advanced projects. Quote provided upon request	$100 per hour	$150/hour; Quote provided upon request	Modifications can be made by any administrator who has attended training or partner with a third-party vendor who charge by the hour based on SOW	$200/hour, T&M basis to be negotiated	$200/hour, T&M basis to be negotiated	$85/hour; Quote provided upon request	Based on an assessment of the scope of work and quoted per project
Support & Training								
Phone	✓	✓	✓	✓	✓	✓	✓	✓
Chat		✓	✓	✓	✓	✓		
Email	✓	✓	✓	✓	✓	✓	✓	✓
Account Manager	✓	✓	✓	✓	✓	✓	✓	✓

	Link2Feed	Minute Menu	Oasis Insight	Salesforce	Social Solutions Apricot	Social Solutions Efforts to Outcomes	Sox Box FoodBank Manager	Virtual Case Manager
Initial Training Set-up Cost	Train the Trainer Program for 3 Super users included in initial set-up costs	No fee for initial Training. Additional training packages after implementation available for purchase for an additional fee	Free group webinar training provided with network implementation.	Several free training options exist, additionally non-profits may take advantage of 'For Fee' Training classes	Included in set-up costs: (4) Consultation calls, Access to automated learning path, activation of chosen templates including Food Pantry module. End user training starts at $600; Virtual Admin Bootcamp $1,000	$1,300/year Administrator Training subscription; $950/year Report Writer training subscription; free e-learning library available for end users	Train the Trainer Program for 2 users included in Maintenance	Standard Training with Sign Up: 2 hours of phone support, unlimited email support for 1 year

	Link2Feed	Minute Menu	Oasis Insight	Salesforce	Social Solutions Apricot	Social Solutions Efforts to Outcomes	Sox Box FoodBank Manager	Virtual Case Manager
Features								
Create Profile	✓	✓	✓	✓	✓	✓	✓	✓
Upload Data File	✓	✓	✓		✓	✓	✓	✓
Cloud-Based†	✓	✓	✓	✓	✓	✓	✓	✓
Customizable (COTS)	✓			✓	✓	✓	✓	✓
Peripheral Device Integration	Cell phone, tablet, Bluetooth pens, drawing pads, Scriptel signature pad	Smart phones, tablets	Signature pads, Barcode scanners, Webcams, ID Card Printers	Smart phones, tablets	N/A	Topaz signature pad, barcode scanning in 2018	ID and 2D USB and Bluetooth Barcode readers, webcams	✓
Dupe Management	✓	✓	✓	✓	✓	✓	✓	✓
Automated Unduplicated Client Data†	✓	✓	✓	✓	✓	✓	✓	✓
Anonymous / Undisclosed Client	✓	✓	✓	✓	✓	✓	✓	✓
Geolocation	✓		Link to view client address on Google Maps	Available via the AppExchange	✓	✓	✓	✓
Electronic Signature	✓	Add-on feature	✓	Provided via third party partners	✓	✓	✓	✓
Supports HMIS (Homeless Mgt. Information System)	Available through customization		HUD-Compliant HMIS Module Available	Available through customization	Includes Victim Services Tracking	✓	Available through customization	
Data Ownership	Food Bank and agency (both have rights to their own data)	Food Bank	Food Bank	Food Bank	Food Bank or Agency (follows the customer)	Food Bank or Agency (follows the customer)	Food Bank or Agency (follows the customer)	Agency

This tool is part of the broader Service Insights Network Framework

	Link2Feed	Minute Menu	Oasis Insight	Salesforce	Social Solutions Apricot	Social Solutions Efforts to Outcomes	Sox Box FoodBank Manager	Virtual Case Manager
Security								
HIPAA Compliant	Follows all HIPAA Requirements – Not Itself a covered entity – can sign a BAA*		Follows all HIPAA Requirements – Not Itself a covered entity – can sign a BAA*	Follows all HIPAA Requirements – Not Itself a covered entity – can sign a BAA*	Meets minimum requirements and can sign a BAA	Meets minimum requirements and can sign a BAA	Follows all HIPAA Requirements – Not Itself a covered entity – can sign a BAA*	Follows all HIPAA Requirements – Not Itself a covered entity – can sign a BAA*
TEFAP Compliant	✓		Digital signature included with Oasis Insight Plus. Auto-populated USDA PDF reports are available for nominal customization fees		N/A	N/A	✓	
Encryption Level	Encrypted in data and at rest, at the field level	Industry Standard SSL encryption in transit	ALL data 256-bit encrypted in transit and at rest.	Data is encrypted in transit and at rest	256-bit Secure Socket Layer (SSL) In-transit	256-bit Secure Socket Layer (SSL) In-transit At rest is an additional purchase	Data is encrypted in transit and at rest	Database/Field Level 2048-bit encryption

4. Link2Feed – Last Update 04/2018

General Overview

Link2Feed is a cloud-based software developed for food banks to help agencies complete client intake (registration) in a way that is both dignified for the client as well as efficient and easy for agency workers, many of whom are not comfortable using technology. A social-purpose business and certified B Corporation, Link2Feed is dedicated to "Feeding change" around the world. Link2Feed's social mission is to help organizations use real-time data to take the hypothesizing out of hunger relief, so efforts can be focused on addressing root cause. As part of their B Corp certification, Link2Feed's goal is to work with food bank partners around the world to create to first metric about hunger in developed nations.

Throughout the years Link2Feed has evolved from a food bank database to a tool for understanding hunger from a local, regional, national and international perspective. The software's outcomes-based reporting features allow users to understand, not only who is being served, but also how services are making a difference.

Link2Feed works with organizations to ensure the software evolves with the changing needs of the food banking industry and provides all users with a free version rollout of new features quarterly. Link2Feed is supported by a team of poverty and advocacy specialists to ensure the best data collection and reporting methodology has been incorporated into the system. It is rare that a food bank requires custom development work as the system is robust with numerous settings to customize to the needs of each food bank. If there was a need for custom development work it is billed at $150/hour.

A standardized intake form is used to enable a holistic intake process across all programs and agencies. A network-wide searching tool provides the capability to identify clients across the network in order to effectively gather an unduplicated client count and communicate more effectively over client cases. Client dignity is at the forefront at Link2Feed, so there are options for clients to provide the answer of "undisclosed" and to be recorded anonymously. Networks can choose to be structured as "Open"- where they share profile information and a full history of services provided ("visits"),"Semi-Restricted"- where they share profile information but no history of services provided ("visits") or setup in customized sharing "groups" as per food bank preferences.

Link2Feed has automated standard programs for Pantries (TEFAP and Non-TEFAP), CSFP, SNAP, School Pantry and Kids Cafe (children's congregate feeding programs, CACFP, SFSP) to accommodate for the compliance and operational needs for these programs. Custom programs can be created for any other program (ex. clothing programs, meal programs, education programs) that may be network or agency specific.

Link2Feed has developed several specific innovations in the field of service insights:

- Graphic Reporting Suite- Link2Feed provides several "turnkey" reports to all users (food banks and agencies) that can be filtered by date range, program type

and agencies. The statistics report provides reporting on static demographic factors. The Heat Map report shows a physical distribution of food bank clients. And the Interactive report allows users to cross tabulate/"pivot" data with the click of a mouse. Additional program-specific reports are available to support the compliance and reporting needs for CSFP and SNAP. As part of the setup process, Link2Feed develops any standard reports the food bank requires for monthly reporting or state-reporting. All reports come with supporting visuals to make data analysis easy.

- Survey Functionality- The survey tool in Link2Feed enables food banks and their agencies to automate in-depth client data studies, close the client feedback loop, engage in advocacy activities and increase their relationships with researchers/educational institutions. Surveys with numerous question types can be easily created in the system and sampling frameworks can be developed to target specific types of respondents. For example, an organization could create a survey that is displayed to 50% of households that contain one or more child. Link2Feed tracks survey responses (as well as non-response rates) and provides associated reporting tools. Survey responses can also be exported, along with client profile information, into Excel for import into SPSS or other statistical software.

- Understanding Client Access Patterns- Because of the way Link2Feed manages duplicates all activity for a client remains under the same profile. Link2Feed clients are also flagged with an automatic status, to better understand the difference between ongoing ("Active") clients, Temporary ("Inactive") clients, and Episodic (Individuals who change between "Active" and "Inactive" status) clients. Short-term, this functionality helps to provide an unduplicated client count, but long-term it provides a longitudinal view of how clients access food bank services and a better understanding of their transiency through the social service system as well as key risk factors such as housing insecurity.

- Inventory and Point of Sale Systems- Link2Feed's client intake tool is also integrated with an inventory and point of sale system to track exactly what food is going to clients (to better understand nutritional value and define health outcomes) and to provide real-time inventory counts at the agency level.

- Advanced API- A connection point to integrate into other systems, including collective impact software or data initiatives.

The Link2Feed licensing agreement outlines that the food bank is the owner of the data. Client and visit data can be extracted via the Export tool (for those who have the appropriate permissions) as a csv file/into Microsoft Excel at any time for further reporting and statistical analysis.

References

Organization	Point of Contact	Installed Users	Phone/email
Oregon Food Bank	Leslie Sampson-Director of Partnerships and Programs	25 CSFP Sites 79 Pantries	lsampson@oregonfoodbank.org (503) 282-0555
Food Bank of the Rockies	Cindy Mitchell-Chief Programs Officer	131 CSFP sites 100 agencies by Sept 2017	cmitchell@foodbankrockies.org (303) 371-9250
Fredericksburg Regional Food Bank	Atiye Chappell-Development Coordinator, Network and Info Systems	133 Pantries, 3 CACFP Sites, 9 SFSP Sites	achappell@fredfood.org (540) 371-7666
Arizona Department of Economic Security	Gloria Garcia-Hernandez	3 Food Banks	ggarcia-hernandez@azdes.gov 602-771-2790

* A full listing of Link2Feed clients can be found at www.link2feed.com/our-clients

Contact Information

Primary Contact:	Emily Branton, President
Address:	400 Renaissance Center, Suite 2600, PMB 1129, Detroit, MI, 48243
Phone:	TF: 1-855-489-6898 ext. 258 Local: 810-292-0092
Fax:	N/A
e-mail:	connect@link2feed.com ebranton@link2feed.com
Current Release:	Link2Feed Version 2.4.3
Company (year began):	2010
Client Data Tracking (year began):	7 years
Company Type: (Public/Private/Non-Profit)	Private, B Corporation

Product Details

Dimension	Summary
Number of installations	Summary
Total installed user base	3,336 organizations (food banks and pantries) 9,661 users
Product release schedule	Initial Release: 2010 Last Release: April 2017 Next Planned Release: January 2018

Pricing & Licensing	• One-Time Setup Fee: Starting at $499 (custom quoted by number of agencies)
	 • Monthly:
	      o Pantry: $12+/site/month
	      o Kids Cafe: $25/site/month
	      o Inventory: $12+/site/month
	      o CSFP: $9+/site/month
	      o SNAP: As low as $50/month

Support & Training	• Link2Feed provides unlimited support directly to the food bank, as a part of the licensing/maintenance fee, the food bank supports their partner agencies to make the process cost-effective
	      o Link2Feed provides phone, email and in-portal support ticketing services 24/7/365 for the food banks included in their monthly fees as part of the standard structure; if a food bank cannot provide end-user support for partner agencies, a contract can be negotiated for Link2Feed to provide the necessary support to agencies
	      o A support manual and support/training videos can be found directly in the Link2Feed system and are available to all users. Customers can self-service at any time through the portal using these tools (both searchable by keyword)
	      o All inquiries are handled based on level of severity (for example, a stop work bug would receive an immediate response, while a general question would take a bit longer) – The standard for initial response is 3-5 hours, however responses are typically around an hour
	 • New features are entirely community-driven; all feature requests are recorded in a project management system and a log is produced for the number of times a particular feature is requested and by whom
	      o Quarterly, the most requested features are assessed, developed and rollout out as part of a free quarterly version rollout
	      o Anyone who requested a feature that has been selected for a rollout or suggested they would like to be part of new feature assessment, are contacted to be part of the testing and feedback process

	o User notifications and free webinars are also provided to demonstrate the new features to the users o Following each version rollout, a customer satisfaction survey is issued through the system (A KPI for Link2Feed is a minimum of 85% satisfaction) – identified areas of confusion or concern are addressed with follow-up webinar learning sessions o Feedback is tracked for future version rollouts and users can request a follow-up call from Link2Feed or their network administrator for information if they have any concerns.
Features	• Link2Feed manages duplicates in two ways: o Inline (On intake) - When an individual is added that meets the duplicate matching criteria a "possible duplicate" notification will appear and give the intake worker the ability to use, ignore, dismiss, move, or link o Retroactive (Client Duplicates List) - A list of all potential duplicates in the network are displayed in "Client Duplicates List" highlighting what flagged the match as a duplicate • In addition to duplicate management, Link2Feed also provides merge and unmerge functionality for any user profile as well as functionality to move or link individuals between households • A client is defined by name (First and last), date of birth, gender and ethnicity • Link2Feed defines a 'visit' by: o Program Type o Date o Location o Recipients
Security	• Link2Feed follows all HIPAA "required" elements as a data protection best practice • Access to PII data is managed via data/application access tools • Encryption occurs at the field level • Data is encrypted in transit and at rest (critical data such as passwords, ID #, etc.)
Infrastructure	• Minimal technical/browser requirements include internet access with an up-to-date version of one of the following: o Google Chrome o Opera o Mozilla Firefox o Safari 7+ (for OS X only) • Browser setting should be set with: o JavaScript o Cookies o SSL o Flash must be enabled • Optimal technical environment includes one of the following:

	- Windows Operating System (Windows 7, 8 or 10) - Mac OS X Mavericks (10.9) or Yosemite (10.10) - Linux Fedora 20+ - Ubuntu 14.04+ - Hardware requirements: - Memory (Ram) - 512 MB - Hard Drive Space- 500 MB
Compatible Peripheral Devices	- Cell phones and tablets - Bluetooth pens - Drawing devices - Scriptel signature pad

5. Minute Menu CX – Last Update 09/2017

General Overview

Minute Menu Systems integrated software program streamlines the task of processing monthly CACFP and SFSP claims for participating institutions and enables real-time tracking of all meal service claims during any given day.

Minute Menu CX was developed with one goal in mind, to maximize CACFP reimbursement by reducing the amount of time and energy wasted chasing down attendance and meal counts. The software enables the user to accurately track and report meal counts by replacing the common manual spreadsheet with software that complies with the requirements of both the CACFP (including Kids Café) and SFSP. The customer can predict, based on the previous day's meal count reporting, the quantity of meals needed for future meal service times, ultimately reducing food waste.

With over 600 institutions serving more than 60,000 feeding sites in 47 states, Minute Menu has developed close-knit, long-standing partnerships with their customers.

Customers retain sole ownership of all data entered in the Minute Menu CX software and can extract real time data for clients, claims, sites, reviews, or financials using the Microsoft Excel export tool to create custom reports or conduct statistical analyses.

Software features include:

- Client enrollment, classification and participation in CACFP
- Identify and report the number of participants served by site, region, program, or date range
- Record attendance and meal counts by client or site with real time reporting
- Cumulative recording of meal counts by site and across a range of sites
- Plan meals by site or for all sites using a centralized menu system
- Meal production records and delivery receipts
- Purchasing reports by site or in aggregate across sites for any range of dates
- Manage receipts and expenses for non-profit food service reports
- Process and submit food claims for reimbursement
  - Integration with state systems available
  - Automated edit checks ensure compliance with regulations and reduce costly errors
- Plan, conduct, and record site reviews

References

Organization	Point of Contact	Installed Users	Phone/email
Regional Food Bank of Oklahoma	Katie Swanson Congregate Feeding Manager Ryan Abernathy	40+ Kids Café sites	405-600-3141 kswanson@regionalfoodbank.org 405-600-3151 rabernathy@regionalfoodbank.org

	Senior Director of Programs and Nutrition		
Greater Chicago Food Depository	Kelsie Kliner Senior Manager of Children and Adult Program Operations	117 Kids Café sites 480+ SFSP sites	773-843-7792 kkliner@gcfd.org
Second Harvest of South Georgia	Winona Green Kids Café Manager	70+ Kids Café sites	229-244-2678 x. 214 wgreen@feedingsga.org
Food Bank of Central & Eastern North Carolina	Mercedes Sanders Summer Food Service Program Supervisor	180+ SFSP sites	919-863-9528 msanders@foodbankcenc.org

Contact Information

Primary Contact:	Cindy Vian
Address:	1101 E. Arapaho Rd., STE. 240
	Richardson, TX 75081
Phone:	972-671-5211
Fax:	972-235-8651
e-mail:	cindy@minutemenu.com
Current Release:	Minute Menu CX 11.3.0.4590
Company (year began):	1993
Client Data Tracking (year began):	1993
Company Type: (Public/Private/Non-Profit)	Private

Product Details

Dimension	Summary
Number of installations	200+
Total installed user base	6,285
Product release schedule	Continuous
Pricing & Licensing	$450 per license (one-time fee) $450 annual software maintenance fee (annual fee) $39/month/site (monthly per site fee) • The monthly per site fee is applied when claim data for a site is entered into the system. Claims are billable if they are entered in whole or in part, regardless of whether they are processed or submitted for reimbursement. *$7.50/month/site

	This fee is applied if the site was active in the software but did not record claim data for a month. Non-claim features include managing child enrollment and menu production records.
Support & Training & Implementation	New customers are assigned a dedicated Implementation Specialist who guides the user through setup tasks, customizable food options and software rollout planning. This process includes configurations to match the customer's specific business requirements. This initial training is provided at no cost. Additional training packages after implementation may be purchased for an additional fee.
	Access to free training videos, documentation, e-Learning courses and live webinars are included in the initial purchase of the software. These resources are available for both the food bank user and site-specific user.
	Technical support is provided via telephone and email. Up to one hour of technical support per month is included with purchase after which an hourly support fee is incurred. Fees are listed in the Exhibit A License and Service Pricing page of the Minute Menu CX License agreement.
	In addition to technical support, up to three hours of audit support are included per calendar year.
Features	Food banks enroll Kids Cafe, SFSP and other sites into Minute Menu CX, creating accounts for each site, enabling them to record all aspects of nutrition program operations. This includes fields for recording all contact, location, and site-specific information such as fire, health and sanitation inspection dates, capacity, hours of operation, approved meal types and serving times.
	Kids Café, SFSP, and other sites record attendance and meal counts in real time from any mobile device with access to the Internet or on paper forms printed from the software and later scanned or entered into the software. Food banks can then verify that all sites have recorded at point-of-service with one click. With this functionality, food banks virtually eliminate the risk of having to return funds to their state agency for lack of required records to substantiate claim submissions.
	Meal production records combined with transportation and delivery receipts calculate automatically based upon estimated attendance or using historical patterns based on actual attendance/meal counts entered.
	Automated edit checks ensure errors are detected prior to claim submission, and integration with multiple state agency websites reduces time spent submitting information for reimbursement by uploading claim information directly to the state website.
	If children are enrolled into the system (this is optional, but recommended), duplicate children can be detected across all of your feeding sites.
	A variety of standardized reports can be generated both in PDF as well as XLS export. Reports include: rosters, attendance, meal counts,

	menus, menu production records, transportation logs, purchasing reports, and milk audits. The system also automatically does edit checks for CACFP (including Kids Café) and SFSP. Users have the ability to create custom reports using export features inside the software.
Data Security	Minute Menu utilizes industry standard practices for data security: • Encrypted data communication channels • Firewalls • Password Protection Redundant secured backups
Infrastructure	For the food bank user, the client (user screens) are installed on your local computer. Feeding sites can access the software via web browser on almost any device or may install the client on a local computer. Minute Menu CX utilizes a cloud-hosted database, so no data is stored on the local computer or device. • Food bank users will require one of the following Windows Operating Systems Windows XP (Service Pack 2 or Newer) • Windows 7 • Windows Vista • Windows 8 • Windows Server 2003 • Windows Server 2008 Microsoft .NET 3.5 framework is required. If it is not already installed Minute Menu CX will install if for you during the installation process. Minimum 40 MB hard drive space, 1 GB RAM, 1GHz CPU, 1024 x 768 resolution. For food bank and feeding site users: Internet access required. Modern, updated browser required. (Chrome recommended.) Feeding site users will require a mobile device. If using a computer with the installed client, then the computer requirements will be the same as for food bank users above.
Data Management	• Minute Menu CX utilizes a cloud-hosted database and industry standard practices for data security (See "Infrastructure" and "Data Security" above) • Food bank client retains sole ownership of all data entered into Minute Menu CX • Minute Menu will not disclose client data to any person or entity outside of the client and Minute Menu personnel unless required to do so by state or federal regulation, government subpoena or a valid court order Additional information available on license agreement
Number of installations	200+

6. Oasis Insight – Simon Solutions – Last Update 8/2017

General Overview

We consider it an honor and privilege to serve 65 food banks and state-wide feeding initiatives in 28 states with our American-made solution. Simon Solutions provides cloud-based client management and outcomes-driven software services. Oasis Insight is their solution for Food Banks and their partner agencies to perform client intake, distribution, measure outcomes and reporting. This summary showcases some of the features to help Feeding America network members track and report on client-level data.

Oasis Insight is deployed via Software-as-a-Service (SaaS) solution securely accessed via any web browser. Oasis Insight allows Food Banks to create a standardized, coordinated intake process, record client distributions, customize the specific data elements/metrics needed for reporting and grant writing, and allow the Food Bank Oasis Insight administrator to directly generate reports for individuals' agencies or network-wide. The data-driven approach of Oasis Insight allows service providers to identify service gaps, demonstrate impact to funders, analyze demographic information, and make data-driven decisions to move clients from crisis to self-sustainability.

Oasis offers the following features:

- Cloud-based, easy-to-use Case Management: Conduct standardized intake, provide service, run reports, quickly view a household's dynamics, and be more efficient.
- Manage Feeding Programs CSFP/SNAP/TEFAP/TANF/USDA: Record digital signatures upon distribution and manage recertification. Paperless and 100% USDA Compliant.
- Barcode Scanning/Client ID Cards: Streamline distribution processes and reduce data entry time.
- Comprehensive Reports: Generate detailed, outcome-based reports to provide statistics needed for funding, identifying service gaps, and making data-driven decisions.
- Free Support & Training: Phone, email, and chat support and webinar-style training.
- Customization: Oasis Insight can be tailored to meet the unique needs of the customer. There is a rate of $150/hour for additional customizations outside of current customizing functionality. Quotes are provided upon request.
- Bulletins: Bulletins are messages that can be sent to all partner agencies that are displayed on the home screen and can optionally be emailed every user.
- Applications Module: Provides a way for agencies to record the progress of applications (e.g. SNAP/CalFresh) or create an assessment for the client.

- Programs supported: Pantry, Meal, Assistance (clothing, rent, utilities, etc.) CSFP Module, TEFAP/EFAP/SFPP Module, SNAP applications, SNAP events, outcomes, referrals.

The Food Bank Network Administrator manages partner agency access and user permissions. Upon approval, partner agencies can assign an agency administrator that handles user access and permissions for their particular agency.

Oasis Insight is hosted on Amazon Web Services, and the customer retains all rights to their data and data is backed up daily. Select Simon Solutions support staff and engineers have the ability to access the solution to provide necessary support and maintenance of the system. Oasis Insight provides a utility that allows the entire data set to be exported from the system. Data can also be filtered and exported directly from individual reports.

Ongoing upgrades and patches are provided to all clients and at no additional cost. Certain new features may only be available in the Plus version of Oasis Insight or require a one-time configuration fee. The creation of customized reports and additional services costs beyond the initial implementation and training are fee based on level of effort.

References

Organization	Point of Contact	Installed Users	Phone/email
The Greater Boston Food Bank Boston, MA	Jonathan Tetrault, Capacity Manager	71 agencies; (CSFP, School Pantries, Brown Bag, Mobile Market and more); 267 users	jtetrault@gbfb.org 617-427-5200, ext. 5062
Regional Food Bank of Oklahoma Oklahoma City, OK	Rhea Woodcock, Administrative Coordinator	38 agencies; 149 users	rwoodcock@regionalfoodbank.org (405) 600-3147
Central Texas Food Bank Austin, TX	Heath Ribordy, Agency Relations Supervisor	71 agencies; 258users	hribordy@austinfoodbank.org 512-684-2503
East Texas Food Bank Tyler, TX	Kirk Goodman, Agency Relations Supervisor	62 agencies; 201 users	kgoodman@easttexasfoodbank.org 903-597-3663
Fulfill (formerly, The FoodBank of	Barbara Scholz, Director of	29 agencies; 137 users	bscholz@foodbankmoc.org 732-731-1400

Monmouth and Ocean Counties)	Advocacy and Programs		
San Diego Food Bank, CA (*Note: This organization is not a Feeding America member food bank.*)	Vanessa Moore, Vice President of Operations	24 agencies; 117 users	vmoore@sandiegofoodbank.org 858-863-5114

Contact Information

Primary Contact:	Joey Yarber
Address:	451 Lane Drive, Florence, AL, 35630
Phone:	1-888-764-0633
Fax:	1-256-293-4208
e-mail:	info@simonsolutions.com
Current Release:	Oasis Insight
Company (year began):	2006
Client Data Tracking (year began):	2006
Company Type: (Public/Private/Non-Profit)	Private

Product Details

Dimension	Summary
Number of installations	4,788 agencies
Total installed user base	12,680 users
Product release schedule	Initial Release: May 2010 Last Release: Ongoing Next Planned Release: Ongoing
Pricing & Licensing	• Oasis Insight is deployed via Software-as-a-Service (SaaS) and is built as commercial off-the-shelf (COTS) solution • Offline CSV importing available • Based upon the unique needs of food banks, customizable pricing as low as $8/month per pantry. Volume discount and unlimited pricing options available upon consultation. • If additional customizations are required (outside of current customizing functionality) there is an hourly rate of $150. Quote provided upon request • Each license includes 5 authorized users for that pantry, additional blocks of 5 licenses can be added for the same fee as an additional pantry

	• Costs for on-going maintenance is included in the licensing fee • Simon Solutions offers a service for a fee where a user can request specialized reports
Support & Training	• Simon Solutions offers email, phone, and chat support each business day from 8 am to 5 pm CST
Features	• Oasis Insight provides an administrator-controlled standardized client intake form, customizable with an unlimited number of data fields to create a comprehensive, data-driven profile for your clients. This results in a standard for all member agencies. • Duplicates are handled proactively by checking to see if a client already exists when trying to add a new client to the database. In addition, a duplicate client report can be ran at any time to display a list of possible duplicates with the option to merge matching client profiles together. These duplicate warnings are based on Name, Date of Birth, Social Security Number, and Address and can be further customized. Client case files are shared by all partner agencies in the food bank network. Unduplicated counts are included in reports at the food bank level network-wide. • After initial intake, Oasis Insight Plus provides barcode and ID functionality, allowing distribution to take seconds for each client.
Security	• Oasis Insight complies with HIPAA • All data, including PII, is encrypted in transit and at rest, data on the servers is encrypted at the file system layer • 256-bit SSL encryption • Permissions Tools enable the Administrative team to establish appropriate access levels for staff, including record-level access
Infrastructure	• Any PC or MAC made in the last 4 or 5 years meets minimum system requirements • A reliable internet connection is the only hardware/networking requirement • As a SaaS solution Oasis Insight is compatible with Internet Explorer, Google Chrome, Mozilla Firefox, or Safari. Must have up-to-date versions. • It is recommended that staff and administrators use the latest versions of their preferred browser
Data Management	• Simon Solutions offers database import services that will analyze existing data, make necessary formatting changes and import the data. • End users may define additional fields for capture
Implementation Approach	• A custom implementation plan will be developed that paces the blueprint/design, build-out, professional services, training, and data migration appropriately within the desired roll-out period
Compatible Peripheral Devices	• Digital signature pads/drawing tablets • Barcode scanners • Webcams • ID card printers

7. Salesforce.org – Last Updated 8/2017

General Overview

Salesforce provides client management and outcomes software services. They offer a customizable tool for data collection and reporting. This summary showcases some of the features to help Feeding America network members track and report on client-level data.

Salesforce is deployed via Software-as-a-Service (SaaS) and is built as commercial off-the-shelf (COTS) solution that can be fully customized. Several configuration options exist and embedded reporting tools allow local system administration, dashboard management, and creation of ad-hoc queries/reports with no code level manipulation or additional services costs beyond the initial implementation and training. Modifications can be made by any administrator who has attended training. Customers may also engage third party system integrators who charge by the hour within a statement of work. The solution allows service providers to track the progress of clients, and services provided to them. Service providers can report on progress to stakeholders and can use their data to inform internal practices to improve the quality of services delivered.

Salesforce solutions are provided as a service, and the customer retains all rights to their data. User access is determined by the organization when they set up user accounts and set those user account permissions. Salesforce offers a utility that allows the entire data set to be exported from the system via Expert Services utilities including: weekly export, data loader, APIs EAI tools, etc.

With Salesforce's highly configurable and customizable platform and applications, you can manage all of your programs from one central location. Salesforce supports Marketing, Fund Raising, Client Tracking and Agency Tracking. Maintain comprehensive contact and demographic information about constituents and volunteers, categorize and manage cases, organize and schedule resources, log and categorize assets, support and enforce workflows, automate assignment of tasks, and track detailed activity histories all in one easily configurable system. Dashboards and reporting tools let you monitor key statistics at-a glance and dig in deeper to measure outcomes and impact. Salesforce enables all agencies to be maintained in a single database which would preclude duplication.

Ongoing upgrades and patches are provided to all clients and at no additional cost.

Salesforce.org has key and specific capabilities that are important to *nonprofits* including Donation Management, Grant Management, Program Management, Reporting & Analytics.

- **Donation Management:** allows you to track and manage your donations with various capabilities including-
  - *Recurring Donations and Pledges*- see which donations are recurring and which donors have pledged to donate over a set amount of time. Ensure you are tracking giving details correctly and easily identify trends

- ○ *Hard, Soft and Partial Soft Credits*- many nonprofits struggle to give partial credit to individuals when a large check comes in from third-party organizations. Instead of separate Opportunity records, Partial Soft Credits in NPSP allows you to create one Opportunity for one check--while applying the right amount of credit to the right Individuals. You are also able to track separate totals for hard and soft credit on a Contact's record, ensuring that a full picture of someone's giving is present.

- ○ *In-Kind Gifts*- donations of goods or services are tracked with their own record type and custom fields so nonprofits can properly manage all types of giving.

- ○ *Honor/Memorial Gifts*- opportunities can be marked in honor or in memoriam of someone and you can keep track of the people besides the donor involved with those gifts, such as the person who should be notified that a gift was made in memory of their deceased loved one

- ○ *Matching Gifts*- identify companies that provide matches, and link donations to donors who initiated the match as they come in

- ○ *Membership Tracking*- track membership expiration dates and grace periods to keep constituents engaged

- ● **Grant Management:**

  - ○ *Grant Management*- manage all stages of the grant process from Letter of Intent (LOI) to receiving the grant and reporting back to funders.

  - ○ *Deadline Tracking*- track grant deadlines and deliverables as well as tasks associated with ensuring grant reports are done in a timely fashion

- ● **Program Management:**

  - ○ With the Nonprofit Success Pack and the Salesforce Platform, you can easily manage, track and automate all types of programs depending on your needs.

  - ○ Our customers are successfully managing programs in a wide range of areas, all through the power of the Salesforce platform. They have created custom objects and fields for managing participant applications, cases for social workers, tracking animals in shelters, and much more. The best part is that creating custom objects, fields, and even complex automation do not require advanced coding skills but can be done through point and click tools.

  - ○ Case Management

  - ○ Engagement Plans

  - ○ *Volunteer skills and availability:* match volunteer skills to volunteer opportunities available

  - ○ *Shift management:* manage volunteer shifts to allow for a seamless volunteer experience, even allowing people to sign up for shifts directly from your website

- **Reporting & Analytics:**
  - Robust prebuilt donor reports and dashboards that both look good and offer solid insights into your organization.
  - With a few clicks, you can easily create dashboards and run reports to ensure you know what is going on in your organization.
  - For example, create a dashboard to easily see who hasn't given this year or view your pipeline for major giving management.

References

Organization	Point of Contact	Installed Users	Phone/email
Greater Boston Food Bank	Please contact Salesforce for detail	Not provided	Not provided
Food Bank of NYC	Please contact Salesforce for detail.	Not provided	Not provided

Out of respect for their customers and their privacy, Salesforce does not provide blanket references.

If a Feeding America member is interested in learning more about Salesforce.com from a Salesforce.com customers, Salesforce.com will work with any member food bank to arrange for a discussion with one or more of food banks currently using Salesforce.org for data tracking.

Primary Contact:	Amy Wiesenmayer, Account Executive
Address:	350 Mission Street, San Francisco, CA, 94105
Phone:	952-926-3828;1-800-NOSOFTWARE
Fax:	415-813-5782
e-mail:	awiesenmayer@salesforce.com
Current Release:	Sales Cloud, Summer 2017
Company (year began):	1999
Client Data Tracking (year began):	2000
Company Type: (Public/Private/Non-Profit)	Social Enterprise Non-Profit

Note: Salesforce.org is a non-profit reseller of salesforce.com products & offerings. Salesforce.org is a self-funded social enterprise providing technology to social impact organizations.

Product Details

Dimension	Summary
Number of installations	Over 28,000 nonprofit organizations. Over 125,000 total organizations worldwide.
Total installed user base	Over 28,000 nonprofit organizations. Over 125,000 total organizations worldwide.
Product release schedule	Initial Release: 2000 Last Release: Summer 2017 Next Planned Release: Winter 2017
Pricing & Licensing	• Salesforce is deployed via Software-as-a-Service (SaaS) and is a customized solution • Salesforce offer 10 free user licenses per each qualifying 501(c)(3) using the solution, incremental licenses are $432 per user per year (Salesforce Sales Cloud, Foundation Enterprise Edition); additional information can be found at salesforce.org • As a SaaS offering, there are not implementation fees, initial implementation costs are included in the annual license fee • Configuration and customizations to the application, additional report development and data migration will be contracted on a T&M basis to be negotiated with a Salesforce certified implementation partner. • There is no ongoing maintenance, costs for on-going maintenance are included in the licensing fee

Support & Training	• Support and training services are offered at three levels:
	  ○ Standard Success (included with all user licenses)
	  ○ Premier Success (Most popular) (available as an upgrade)
	  ○ Premier Success + (available as an upgrade)

Features	• Salesforce allows staff to create a client profile by entering client contact and identifying information in an online form; once crated, can be searched for and can trigger duplicate warnings based on client, household or any other type of profile record • As a COTS solution, Salesforce can be customized to support different processes and services offered by food banks and their partners • API access to integrate with other applications • Client intake is a simple process requiring the user to fill out demographic (contact and identifying) information in a form; this can take under a minute if the form is short and/or the agency does not require a lot of fields
Security	• Salesforce complies with HIPAA, • All data, can be encrypted at different levels from entry to full database encryption • Permissions Tools enable the Administrative team to establish appropriate access levels for staff, including record-level access

Infrastructure	• A reliable internet connection is the only hardware/networking requirement • As a SaaS solution Salesforce is compatible with Internet Explorer, Google Chrome, Mozilla Firefox, or Safari • It is recommended that staff and administrators use the latest versions of their preferred browser
Data Management	• Data migration is executed through the implementation first phase in which a plan is established • Salesforce includes a form building tool provides flexibility to create forms for documenting a variety of different services
Implementation Approach	• Salesforce provides the service, and it is the responsibility of the customer to implement the software • In general customers work with a certified Salesforce partner or conduct the implementation themselves
Minimum System Requirements	• Any device that supports a browser meets the minimum system requirement
Encryption	• Data is encrypted in transit and at rest. Our shield solution encrypts data at rest and tracks activity history and event monitoring
Compatible Peripheral Devices	• Smart phones • Tablets

8. Social Solutions Global – Apricot and Efforts to Outcomes – Last Updated 09/2017

General Overview

Social Solutions Global, Inc. (SSG) provides client management and outcomes software services. They offer a portfolio of web-based tools for data collection and reporting. SSG offers two solutions, Apricot and Efforts to Outcomes (ETO). Apricot is an appropriate solution for single organizations looking to adopt a system to track clients and services. The ETO solution has the structure and role permissions to accommodate a collaborative approach for a food bank and its member agencies to use a single platform allowing for electronic referrals of clients across the network and community wide reporting. Both solutions can be used to track client/case management related to pantries, distribution of meals, child/youth programming, employment programs and other self-sufficiency related programs. This summary includes attributes for both products to help Feeding America network members track and report on client-level data.

Both solutions are deployed via Software-as-a-Service (SaaS) and are built as commercial off-the-shelf (COTS) solutions. Front end administration tools simplify configuration options and embedded reporting tools allow local system administration, dashboard management, and creation of ad-hoc queries/reports with no code level manipulation or additional services costs beyond the initial implementation and training. Each agency that adopts this software will have at least one designated Administrator who will learn how to make configuration changes to the system, including adding fields, forms and reports. These modifications can be done at any time without additional costs. If the agency would like Social Solutions' assistance with configuration changes, they can scope a project on a Time and Materials basis.

Each solution allows service providers to track the progress of clients, volunteers, staff, and programs. They also allow service providers to report on that progress to funders and other stakeholders and to use their data to inform internal practices to improve the quality of services delivered. Each solution is able to produce a true unduplicated count of all clients across programs by automatically running a duplicate check on any fields set for matching by the Administrator. This check will ensure that the client being entered is not already in the system. This feature is important as it will allow you to have a master record for your clients.

SSG solutions are hosted; and the customer retains all rights to their data. User access is determined by the organization when they set up user accounts and set those user account permissions. Select Social Solutions staff can access the solution to provide necessary support of the system. Data can be queried and exported from both solutions.

Apricot and ETO uses user names and passwords to prevent unauthorized access. Each user account is assigned access to sites, programs and user roles to restrict access to data and features. Data is housed with Amazon Web Services (AWS), a world class hosting facility with state of the art technology to safeguard the data.

Ongoing upgrades and patches are provided to all clients and at no additional cost. From time to time, new features are released which is either highly technical in nature or not essential to all clients; often these add-on tools will require an activation and/or recurring fee (e.g., automated data import tool). Periodic enhancement webinars are offered in coordination with new feature releases and product upgrades.

References

Organization	Point of Contact	Installed Users	Phone/email
Out of respect to our clients, Social Solutions does not publish referral information to avoid any client from being contacted too often. However, Social Solutions would be glad to connect agencies with references upon request.			

Contact Information

Primary Contact: Connect with your regional representative by completing this online form: http://landing.socialsolutions.com/Contact-Social-Solutions.html

Address: 10801-2 North MoPac Expressway Suite 400 Austin, TX 78759

Phone: (877) 441-2111

E-mail: moreinfo@socialsolutions.com

Current Release: Apricot v6.8 Efforts to Outcomes (ETO) V 2017.2.5.1

Company (year began):   2000

Client Data Tracking (year began):   2000

Company Type: (Public/Private/Non-Profit)   Private

Apricot Product Details

Dimension	Summary
Number of installations	1,800 agencies
Total installed user base	20,000 users
Product release schedule	Initial Release: 2008 Last Release: June 2017 Next Planned Release: Q3 2017 Releases conducted on a quarterly basis
Pricing & Licensing	• Apricot solutions are deployed via Software-as-a-Service (SaaS) and are built as commercial off-the-shelf (COTS) solutions

	• User pricing starts at 10 users @ $590/user annually • Initial setup starts at $2,950 • Customized application changes, report development and data migration will be contracted on a T&M basis to be negotiated • Costs for on-going maintenance is included in the licensing fee • Pricing models are subject to change
Support & Training	• End User training starts at $600; Virtual Admin Bootcamp $1,000 • Social Solutions offers tiered support packages for Apricot depending on an organization's size and needs; Standard support is included or more advanced support services are available at a cost
Features	• Apricot allows staff to create a client profile by entering client contact and identifying information in an online form; once crated, can be searched for and can trigger duplicate warnings based on client, household or any other type of profile record • Apricot can be configured to support different processes and services offered by the agency • Client intake is a simple process requiring the user to fill out demographic (contact and identifying) information in a form; this can take under a minute if the form is short and/or the agency does not require a lot of fields
Security	• All data, including PII, is encrypted while in transit to our servers with 256-bit Secure Socket Layer (SSL) • Encryption applications are accessed by users via a secure HTTPS connection to the ETO web application servers • Encryption protocols and cipher suites meet the Federal Information Processing Standard (FIPS) 140.2 requirements • Encryption at rest is expected to be available by end of 2017 • Permissions Tools enable the Administrative team to establish appropriate access levels for staff, including record-level access
Infrastructure	• A reliable internet connection is the only hardware/networking requirement • As a SaaS solution Apricot is compatible with Internet Explorer, Google Chrome, Mozilla Firefox, or Safari; at a minimum users should have access to a Chrome or Firefox browser • System Administrators will need to use Chrome or Firefox to access the complete Administrative tool suite • It is recommended that staff and administrators use the latest versions of their preferred browser
Data Management	• Data migration is executed through import tool • Apricot includes a form building tool provides flexibility to create forms for documenting a variety of different services
Implementation Approach	• The typical implementation duration for a single organization is approximately three months, but a collaborative of agencies working together will likely take longer to roll out

	• An implementation plan will be developed that paces the blueprint/design, build-out, professional services, training, and data migration appropriately within the desired roll-out period • Member organizations are expected to commit a project manager and subject matter experts to oversee a successful deployment
Compatible Peripheral Device(s)	• None at this time

Efforts to Outcomes (ETO) Product Details

Dimension	Summary
Number of installations	1,200 agencies
Total installed user base	75,000 users
Product release schedule	Initial Release: 2002 Last Release: June 2017 Next Planned Release: Q3 2017

Pricing & Licensing	• ETO solutions are deployed via Software-as-a-Service (SaaS) and are built as commercial off-the-shelf (COTS) solutions
	• Pricing for a collaborative of agencies working together on the platform is offered in blocks of 20 sites (agencies) for an annual license
	   o Initial block - $48,000
	   o Each additional block - $20,000
	   o Total estimate for member Food Banks with 50-75 agencies each is $89,000-$108,000 annually
	• Initial implementation & set-up cost varies dependent on the scope of the project
	• Customized application changes, report development and data migration will be contracted on a T&M basis to be negotiated
	• The license fee includes the use of the software, upgrades, enhancements, support (end user and admins), and online training with the flexibility of raising or lowering the user count as your needs change
	• Costs for on-going maintenance is included in the licensing fee
	• Pricing models are subject to change

Support & Training	• Maintenance and system enhancements are included in the license fee • As a SaaS solution, quarterly enhancements and monthly maintenances will automatically occur • Users will be informed of planned changes, and upgrades/maintenance will always be performed during off hours • The vendor recommends a train-the-trainer approach, which includes an incremental cost of $350-$900

	• $1,300/year Administrator Training subscription; $950/year Report Writer training subscription; free e-learning library available for end users • Basic support included is offered for all customers by phone/email: ○ Monday through Friday 8 a.m. to 8 p.m. (EDT) ○ After hours support is available via email for critical cases Monday through Thursday 8 p.m. to 11 p.m., Friday 8 p.m. to 10 p.m., and weekends 10 a.m. to 8 p.m. • Online chat support is also available Monday through Friday 9 a.m. to 5 p.m. • Each client will also receive an Account Manager who will serve as your Social Solutions liaison and will schedule regular meetings
Features	• Using demographic matching rules ETO will identify a duplicate client at Intake before he/she is saved in the system, enabling a user to determine if there is already a matching record • If a duplicate is accidently created during data entry or batch upload, ETO also provides a "Merge Client" functionality that allows authorized users to manually select a master record to trust demographic data and will then combine all case notes, trainings, and services under the merged participant • ETO can be configured to match the processes, data collection, and reporting needs of food banks and their member agencies
Security	• Social Solutions has standardized its annual PII training for employees that includes testing and scoring ALL employees to demonstrate their competency level
Infrastructure	• Ability to access the application through an internet connected device. A minimum speed internet connection of 9 mbps up/11 mbps down minimum requirements is recommended (Optimal is 15 mbps up/17 mbps down) • Admin functionality is available from Microsoft Internet Explorer 10 and 11 and basic client management available from multiple browsers • Browser configuration settings will be established during training and implementation • Minimum hardware requirement of 256 MB memory (1 GB memory recommended); Intel Pentium II processor; 500 MHz or above PC running Microsoft Windows 7 or higher (recommended)
Data Management	• Initial Data Migration from current systems into ETO can occur during Implementation and be built into the Implementation cost or can be completed at a later date • Data migration costs vary based on the amount and type of data, and will be estimated on a T&M basis

	• In addition to standard reports data can also be distributed by exporting to CSV, Excel, Txt, or PDF; files can be set up to automatically ship to a secure FTP for processing into another system • APIs follow industry standards

Implementation Approach	• Implementation for a collaborative of agencies typically takes 6-9 months including discovery process, outcomes consulting and documentation. Implementation services include:
	  o A Project Manager to serve as Customer's primary contact and consultant
	  o Standard Training Videos and Manuals Library as a support to using ETO software and guide through ETO Administrator certification track
	  o Discovery of requirements at both the agency-level and program-level (for each program listed above) regarding data entry and reporting requirements based upon current practices
	  o Recommendations regarding the streamlining/standardization of data collection within programs, and the definition of appropriate program outcomes.
	  o Documentation of the outlining the recommended ETO configuration
	  o Configuration of ETO
	  o Demonstration of configured ETO to select staff

Compatible Peripheral Device(s)	• Topaz electronic signature pad (or can be used without hardware by signing with a mouse or on a touchscreen)

9. Sox Box Software, LLC - FoodBank Manager – Last Updated 04/2018

General Overview

FoodBank Manager is a cloud-based paperless client data tracking solution for food banks and their partner agencies. FoodBank Manager collects client data in a dignified, secure, consistent, and uniform manner across the network of agencies for which it is implemented. FoodBank Manager tracks data for both primary, secondary and any tertiary goods and services provided by an agency. FoodBank Manager tracks the different goods and services individually providing statistical data that is accurate and consistent, specific to the good or service being tracked. FoodBank Manager also provides tools for managing and tracking volunteer hours and donations at the agency level.

FoodBank Manager is a hosted SaaS (Software as a Service) solution that is accessed directly from your browser. There is no software to install, no servers to manage and backups are done by the vendor. Sox Box provides support 24 hours a day, 365 days a year through phone, email and webinars.

FoodBank Manager provides security tools that each agency can use to make sure clients' data is safe and secure at the agency level. Security tools provided for each license is a private database, user roles, individual logins, lockout controls and a personal firewall. These features provide a very secure environment to protect your client's personal information.

The customization available in FoodBank Manager is very powerful, allowing FoodBank Manager to meet the needs of the food bank but also the individual needs at the agency level. FoodBank Manager does have a minimum set of requirements to define a client visit, including the guest ID and address. Visits are processed for a client through 'Tracking Methods'. A 'Tracking Method' is an internal function that is assigned to each good or service an agency provides. They control the frequency a household can visit and records all household demographics information for the visit. An agency can utilize as many 'Tracking Methods' they require to properly manage their distributions.

The various service offerings provided by a food bank are bucketed according to the different outreaches (distributions) that an organization may be running. FoodBank Manager can accommodate an unlimited number of different goods and services that an agency may provide to those in need.

FoodBank Manager owns the software solution and makes no claim to any data entered in FoodBank Manager. The organization that is paying for the subscription is the sole owner of the data entered by the food bank and the participating partner agencies. Only those specifically given access to the system by the subscriber will be able to view or download the data at any time. When an agency terminates its subscription, all data will be provided through a secure download location that will be available for 5 days at no charge.

FoodBank Manager has developed innovations to improve client data tracking for food banks and their associated agencies. Specifically, FoodBank Manager creates a standard platform that will meet the needs of the food bank that all agencies will start with, such as a TEFAP, CSFP or any other configuration. Once an agency is brought on, the agency may need more functionality than the default configuration can provide. In this case, the system admin can allow individual agencies

to make further customization as needed to accommodate the additional services and programs any agency is providing or to accommodate their unique circumstances.

Sox Box does not anticipate any unique requirements or challenges for the deployment of or migration of FoodBank Manager. Implementation is simple, and is accomplished through the dedicated Sox Box support staff and the food bank.

References

Organization	Point of Contact	Installed Users	Phone/email
Greater Chicago Food Depository	Amy Clancy, SR. MGR. of Member Operations	Agencies: 345 TEFAP and Non-TEFAP, Healthy Kids & Senior Programs	Phone: 773-843-2606 Email: acclancy@gcfd.org
Eastern Illinois Food Bank	Madison Dailey Partner Services	Agencies: 53 TEFAP and Non-TEFAP	Phone: 217-549-6234 Email: mdailey@eifoodbank.org
Casa de Peregrinos Emergency Food Program (*Note: This organization is not a Feeding America member food bank.*)	Lorenzo Alba Exec. Director	Agencies: 16 TEFAP, CSFP, Mobile and School Programs	Phone:575-523-5542 Email: lo.alba.jr@gmail.com
Northern Illinois Food Bank	Gale Kimmell Agency Compliance Mgr	Agencies: 64 EFP and non-EFP	Phone: 630-443-6910 ext. 179 Email: gkimmell@northernilfoodbank.org
Northern Neck Food Bank(*Note: This organization is not a Feeding America member food bank.*)	Mark Kleinschmidt	Agencies: 18 TEFAP, CSFP, Mobile	Phone: 804-313-7171 Email: mark@nnfb.org

Contact Information

Primary Contact:	Donald DeDecker
Address:	3209 W Cactus Rd Phoenix, AZ 85029
Phone:	(844) 896-9577
Fax:	N/A
e-mail:	don@soxboxsoftware.com
Current Release:	FoodBank Manager - v 6.4.5

Company (year began):   2011
Client Data Tracking (year began):   2006
Company Type: Private
(Public/Private/Non-Profit)

Product Details

Dimension	Summary
Number of installations	• Sites: 1,572
Total installed user base	• Users: 35,572
Product release schedule	• Initial Release: FoodBank Manager released as a SaaS in May 2011 • Last Release: Individualized Household Demographics, Fixes and miscellaneous upgrades released in July 2017 • Next Planned Release: Advanced Address standardization and CASS certification module
Pricing & Licensing	• $24.95 per month for the Domain + one site license which includes unlimited logins, guests, volunteers, visits, donors, donations & much more. • $20 per month for additional site licenses creating a shared database with agency level and aggregate reporting. • 10+ site licenses - bulk discount available call for pricing. • No Start-up Fees

Support & Training	• FoodBank Manager provides unlimited support directly to the food bank, included in the subscription fee, the food bank will provide the needed support to their partner agencies.
	  ○ Phone, webinar & email support is provided 24x7x365, and is handled directly through the Sox Box Software staff.
	  ○ The Sox Box support team operates as the 1st level of support for the food bank and 3rd level of support for the food banks' agencies. Sox Box trains 2 selected individuals as 'trainers' within the food bank. The trainer's responsibility is to train and support the staff and volunteers within their organization.
	• 1st level of support directly to the agencies of the food bank is available at an additional fee.

Features	• Address Standardization: Standardized addresses make finding returning guests easy, preventing duplicate account creations.
	• Electronic Signatures: Use inexpensive and readily available tablets to take electronic signatures for TEFAP, CSFP and other programs.
	• Cloud Based Application: FBM allows you work from anywhere, home, mobile distributions and home deliveries.
	• Donation Tool: FBM includes a full featured donation management tool at no additional cost.
	• Time Tracker: Use FBM to record your volunteer activity.
	• Customizable: One Size Fits all is not a phrase you will hear using FBM. We are very customizable so you can accommodate the different needs from each of your agencies.
	• Barcodes and Scanners: FoodBank Manager works with scanners and barcodes to make finding returning clients FAST!
	• Hunger Justice: FBM doesn't just take attendance it also prevents double dipping in your pantry and pantry hopping within your group of pantries.
	• Private or Shared Database Setup: FBM provides private single databases for pantries or shared databases for larger organizations. Associations give you the best of both worlds
	• FoodBank Manager provides a report that will identify potential name or address related duplicate accounts
	    ○ Each potential duplicate is presented and provided a hyperlink to the accounts for easy reference; if any of the potential matches are determined to be an actual duplicate the operator can use the merge functions to merge the two accounts together
	    ○ FoodBank Manager allows for merging of two client accounts but does not offer an unmerge option

Security	• FoodBank Manager includes a Groups & Permissions policy feature, allowing users to create as many groups/roles as an organization needs and assign their access independently according to the group • FoodBank Manager's administrators utilize token or key-based authentication to access their virtual servers • FoodBank Manager uses Amazon's EC2 2048 bit RSA key pair, with private and public keys and a unique identifier for each key pair to facilitate secure access • FoodBank Manager has auditing capabilities in place that allow security analysts to drill down into detailed activity logs or reports to see who had access, IP address entry, what data was accessed, etc.; this data is tracked, logged, and stored in a central location for extended periods of time • FoodBank Manager has created and implemented a data backup plan that acts as a contingency plan to protect data in case of an

	emergency; FoodBank Manager creates retrievable exact copies (daily backups) and maintains them for 90 consecutive days • FoodBank Manager adheres to all HIPAA "required" elements as a data protection best practice
Infrastructure	• FoodBank Manager is SaaS solution, hosted on the Amazon AWS Cloud, accessed by web browser, therefore does not install on an agency's computer • FoodBank Manager may be accessed by most current browsers available from Firefox, Chrome, Safari and Opera • FoodBank Manager is platform independent (Mac/Windows)
Data Management	• FoodBank Manager imports from old solutions • FoodBank Manager provides exports in the CSV format • FoodBank Manager does not provide an API
Implementation Approach	• Each food bank is paired with a dedicated Sox Box Support team member to create a custom plan for the implementation, training and rollout of FoodBank Manager.

10. Virtual Case Manager – Last Updated 8/2017

General Overview

Virtual Case Manager (VCM) provides real time client and service tracking. This summary showcases some of the features to help Feeding America network members track and report on client-level data.

VCM is deployed via Software-as-a-Service (SaaS) and is a web based solution that can be fully customized. Simplify configuration options allow agency administration to tailor fit their client and service tracking fields beyond the core set utilized by all agencies of the VCM. Custom and advanced reporting provides the agency real time information with no code level manipulation or additional services costs beyond the initial implementation and training. Custom development is based on an assessment of the scope of work and quoted per project. All development that would be useful to network of VCM agencies will be released to the network of VCM agencies for use at no additional cost. The solutions allow service providers to track the progress of clients, volunteers, staff, and programs. VCM enables service providers to report on that progress to funders and other stakeholders and to use their data to inform internal practices to improve the quality of services delivered. The types of programs VCM supports are pantry, meal, custom services, individual or group reporting, referral system and collaboration services.

VCM is hosted requiring no local workstation installation or updates. All agencies retain all rights to their data. User access is controlled by Agency administrators providing many levels to fit varying Agency needs. VCM offers a utility that allows the entire data set to be exported from the system, or more specifically data can be exported directly from individual reports.

VCM is an integrated, web-based system developed to collect, track, measure, and manage the details about client information and their service needs. Built on a centralized database and utilizing a common information platform, the VCM consolidates client information and record keeping into a uniform, confidential and collaborative system within your agency and throughout the network. VCM was designed for one point of intake throughout the network of registered Agencies. ID cards enable clients to be processed quickly at any location using the VCM system. All services are tracked in the system along with any digital attachments, photos, or e-signatures related to a singular client profile. VCM prevents client duplication through several data integrity checks which enables accurate reporting on the services and demographics of each client. This includes a recursive check performed on name, birthdate and address before saving a new user profile. Agencies are provided matches to ensure the new record is unique before saving.

References

Organization	Point of Contact	Installed Users	Phone/email
Corpus Christi Food Pantry Cincinnati, OH	Diane Arnold		(513) 825-0618
Union Rescue Mission, Inc. Little Rock, AR	Anthony Rucker		(501) 374-1106
Catholic Social Services of Miami Valley Dayton, OH	Marcella Lumpp		(937) 223-7217 ext. 1140
Degage Ministries Grand Rapids, MI	Suzanne Reinink		(616) 454-1661 ext. 230
(Note: These organizations are not Feeding America member food banks.)			

Contact Information

Primary Contact:	David Reichle
Address:	1900 Fairgrove Ave, Suite 164, Hamilton, OH 45011
Phone:	513-826-4364
Fax:	513-826-4365
e-mail:	support@virtualcasemanager.com
Current Release:	2017
Company (year began):	2009
Client Data Tracking (year began):	2009
Company Type: (Public/Private/Non-Profit)	Private

Product Details

Dimension	Summary
Number of installations	600+
Total installed user base	2,375 (607,979 Clients enrolled)
Product release schedule	Initial Release: 2009 Last Release: 2017 Next Planned Release: 2018
Pricing & Licensing	$300 One-time Training and Setup Fee includes: • Initial set-up • 2 hours – Phone Support • Unlimited email support for 1 year

	Licensed per Workstation(s): • 1-2 - $400 per year • 3-5 - $460 per year • 6-9 - $580 per year • 10-14 - $700 per year • 15-20 - $820 per year Unlimited Staff using VCM Unlimited Client Records Unlimited Services Records
Support & Training	**SUPPORT TIER 1** VCM user consults online documentation and videos for support **SUPPORT TIER 2** Agency administrator is notified of the issue and attempts to resolve **SUPPORT TIER 3** User or agency administrator contacts trained support staff at local food bank or Vista Admins **SUPPORT TIER 4** Issue is communicated to VCM support staff using our online ticketing system or by phone
Features	Client ID Card System for Easy Intake Web Camera for Document and Client Photo Capture Bar Code Scanner for ID Cards and Service Recording Electronic Signature Capture Data Duplication Prevention Agency Group Collaboration Collaborating Group Reporting Collaborating Group Administration and Management Custom Client Fields Custom Programs, Services, and Units Custom Forms and Reporting Client Alert System Client Referral System Free Agency Search Engine (http://connectyou.org) Multi-Level User Security Multi-Level Client Information Security Staff Time Tracking Family Dynamic History Extensive Built in Reporting Custom Reporting Data Downloading for Third Party Tool Manipulation Quick Provide System for Large Volume Processing Simple System Designed for Novice Computer Users
Security	TECHNOLOGY SPECS:

	• SSL Encryption • User Auditing • Database Encryption • SAS70 and HIPAA Compliant Datacenter AGENCY DATA CONTROL: • Staff User Level and Feature Control • Client Visibility Control • Client Data Visibility Control • User Tracking • Strong Password Enforcement
Infrastructure	• A reliable internet connection is the only requirement • As a SaaS solution the VCM was developed to be compatible with Internet Explorer, Google Chrome, Mozilla Firefox, and Safari
Data Management	Although the VCM comes preconfigured with common required client demographic fields, service taxonomy, and reporting it also provides the functionality for agencies to define custom fields to track information specific to their needs. • Custom Client Information Fields • Custom Programs • Custom Services and Units • Custom Forms • Custom Document Creation and Data Merge • Custom Report Manipulation • Custom User Roles • Custom Security Levels
Implementation Approach	The VCM staff will work with each Agency individually to provide the initial assistance in Agency setup and training. • Agency Settings • Programs and Services • Staff Roles and Setup • Custom Client Fields • Custom Form Creation • Training for Administrators and Staff The VCM also has a guided enrollment program including video training and testing to enable new Agencies or new staff to learn the main functions of the VCM system. For large networks of agencies it has been very effective to have designated administrators to assist with new roll outs or staff training. The VCM facilitates group management and is designed to enable multi-agency collaboration for the benefits of client referrals and group reporting.

Minimum System Requirements	Internet connection and a workstation with an updated web browser.
Encryption	All communication between the Agency PCs and the VCM data servers are encrypted with 2048 bit encryption. The VCM requires strong passwords for each user that require 8 random characters. The system will require each user to change their password on a 12 month basis. All access to the system is logged by the system. Data is also encrypted within the database to protect again direct system attacks.
Compatible Peripheral Devices	• Camera • Signature pad • Barcode scanner • VCM ID cards

11. Other Vendors

In addition to the vendors who responded to Feeding America's RFI, other firms have some of the capabilities being sought to address Feeding America's efforts to support its member food banks. Food banks interested in looking beyond the vendors who responded to the RFI may independently engage with another vendor. Below is an incomprehensive list of other vendors.

Company/Product
CoactionNet
Food Pantry Manager
FoodStar
Lead Commerce
NetSuite
PantryTrak*
Pantry Works
Peer Place
Shelf Saver, Pantry Saver
VESTA, Partnership Center

In May 2017, PantryTrak requested to be removed from the Technology Buyer's Guide.

12. Appendix – Custom Solution vs COTS (Customized Off The Shelf)

Food banks may access/implement technical solutions in two primary ways: either by evaluating & procuring a COTS (Customized Off The Shelf) package, or through custom development of their own technology. COTS packages are provided by third-party vendors, and are generally paid for through licensing fees based on number of users or sites where the solution is being used. Custom development solutions are built from scratch and are implemented when user groups are unable to identify market available solutions capable of meeting their specific business needs. Custom solutions are typically paid for as capital investments through the hiring of IT consulting firms or direct resources.

There are advantages and risks to either procurement method. Each advantage and risk should be heavily weighed when considering the proper software solution for a food bank's technical solution. The table below summarizes the primary advantages and risks of each approach.

	Advantages	Risks
COTS	• Lower cost options, when looking at a total cost of ownership than custom development • Professional level of stability & technical support provided by the vendor • Satisfaction of approx. 80% of the client's conceptual business needs and 100% of their 'must haves' • Relatively faster deployment time • Technical support for their products, including information on some basic product integrations • Expectation of ongoing support costs that can be planned for budgeting purposes • Delivery of tested functionality and features limits "scope-creep" to mitigate budget and schedule risks	• Customization may be limited • Vendor customization fees are usually very high • Business processes may need to change to accommodate the software • The product may not evolve with business strategy changes • Extensibility limitations may not scale up with the business • May be slow to respond to changing industry needs. • Obsolescence is possible if vendor feature releases do not keep up with your industry

Custom Solution	• Specificity to which a user group can define and meet a set of needs • Expectation of the system meeting 100% of the client's must-haves and accommodate future must-haves, without the cost for unneeded features • Understanding that the user is not dependent on a vendor's release cycle to gain advantages of improvements and added features • Generally, the business does not need to conform to the features and limitations of the COTS package	• Higher initial cost • Ongoing sustainability (e.g. technical support, maintenance, ability to keep up with changing security needs, etc.) • Success or failure of the custom approach depends on the competency of the analysts, developers, project managers and deployment staff to design and develop the solution • Talent to design and develop may not be available • Must maintain technical expertise or staff to support and evolve the solution • Design and development time may be much longer than customization or configuration of a COTS product • Lower user acceptance if certain user needs cannot be met

Given the number of market available solutions and the cost/risk associated with custom development, it is FANO's recommendation that any food bank and associated agencies seeking to implement a Service Insights solution do so by implementing a COTS package. Notably, the primary pro for custom development also happens to be a significant con. Specifically, once a custom solution is developed for a specific user (food bank or agency site), it is difficult to flex that solution to support other users/processes (agency sites).

Custom solutions also require an extensive up-front effort to determine business, technical and compliance requirements. It is often difficult for end-users of an application to appropriately express requirements in a manner significantly detailed enough to build a cost-effective custom development solution. This often results in a delay of implementation, process execution errors due to gaps in the technology mirroring the business process, and often results in costly rebuilds necessary to correct missed or insufficient requirements.

Both COTS and custom development solutions will require ongoing maintenance and support in order to continue to meet an organization's needs over time. It is important to note that food banks will lower risk and increase client demand and satisfaction by purchasing a COTS solution where a maintenance and support plan is provided by the vendor, allowing food banks to focus on delivering client needs.