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Office of the Treasurer
Connecticut Baby Bonds Program: Request for Information
Centralized Inquiry and Data Management System for the Connecticut Baby Bonds Program
July 21, 2025

Schedule:

Milestone	Date
RFI Release	July 21, 2025
Online Information Session	July 31, 2025
Deadline Date for Questions	August 8, 2025
Responses to Questions are Posted	August 15, 2025
RFI Response Date	August 25, 2025

Request for Information (RFI)

Title: Centralized Inquiry and Data Management System for the Connecticut Baby Bonds Program

RFI Number: OTT-BB-2025-01

Issue Date: July 21, 2025

Response Deadline: August 25, 2025, 11:59PM EST

Issuing Agency:

Office of the State Treasurer
State of Connecticut
165 Capitol Avenue
Hartford, CT 06106

Contact for Inquiries:

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Assistant Treasurer - Administration
Chief of Staff, Office of State Treasurer Erick Russell
Email: baby.bonds@ct.gov

SECTION I: INTRODUCTION

The Treasurer of the State of Connecticut requests information to help identify a qualified and experienced organization to serve as the centralized inquiry and data management partner for the Connecticut Baby Bonds Program (“CT Baby Bonds”). Using the information provided by responses to this RFI, the Office of the Treasurer (OTT) will determine next steps in the procurement process. This may include, but is not limited to, releasing a Request for Proposals (RFP).

The ultimate objective is for CT Baby Bonds to establish a centralized, compliant data management infrastructure—similar in function to a customer relationship management (“CRM”) platform—that (1) serves as the primary recipient and registrar of sensitive program data, responsible for logging, updating, and securely managing communications and records with eligible families over time, and (2) performs family outreach and facilitates responses to individuals, with accurate and auditable tracking of all inbound and outbound communications. An estimated 16,000 children each year will be born eligible for the program, spanning all of Connecticut's 169 cities and towns. While the selected entity may also provide optional mailing or physical outreach services, these are considered secondary to the core requirement of secure data stewardship. Due to the sensitive nature of the data involved, respondents must demonstrate established practice of compliance with the Health Insurance Portability and Accountability Act (HIPAA) requirements for business associates, state-level privacy protections, and best practices in data security. The best-suited future partner will have the capacity to ultimately customize the system to process claims or be able to integrate with a third-party administrator’s claims management system.

This RFI will support OTT’s commitment to ensuring that all interactions with families are handled with professionalism, privacy, and cultural sensitivity, and that all program records are managed efficiently and with integrity.

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AN EQUAL OPPORTUNITY EMPLOYER

SECTION II: BACKGROUND

CT Baby Bonds is Connecticut's first-in-the-nation initiative to invest directly in children born into poverty. CT Baby Bonds is an innovative initiative designed to reduce the racial and generational wealth gap by investing \$3,200 on behalf of children born into low-income families enrolled in the HUSKY Health (Medicaid) program. Those funds will be held, managed and invested by the OTT to grow as the child grows. When a participating child reaches adulthood (between the ages of 18-30), they will be eligible to claim funds to be used to buy a home in Connecticut; pay for college, job training or other education; start or invest in a Connecticut business; or save for retirement.

The program interfaces with the Department of Social Services (DSS), community partners, and other stakeholders to ensure effective, compliant, and equitable communication. The program has a unique structure in which eligible individuals cannot claim funds until they turn 18 years and maximum of 30 years after their date of birth, necessitating long-term data management. In addition, any data management system will need to integrate with a claims-management process by July 1, 2041.

SECTION III: PROPOSED SCOPE OF WORK

The information provided through this RFI will be used by OTT to determine the best route to selecting an organization with the necessary qualifications to act as OTT's central point of data management for family communications tied to the Baby Bonds Program. The anticipated scope of work for the system may include but is not limited to:

- A. **Centralized data management** - The vendor will be expected to provide access to a proven, flexible, customized, and secure relational database management software system to support the data and relationship management of CT Baby Bonds, which will:
 - Provide a Customer Relationship Management (CRM) system capable of handling sensitive data securely, managing contacts, communications history, and case management for approximately 16,000 new babies born yearly into the program.
 - Receive eligible participant data from DSS through OTT and retain the data, including the ability to maintain and view historical data.
 - Maintain, view, and update participant data in real time and provide, as needed, an audit trail of data including reports on any data changed or deleted by users.
 - Facilitate data-sharing protocols with authorized entities while maintaining relevant data protection compliance.
 - Ensure compliance with HIPAA and all relevant data protection regulations.
 - Support the claims processing functions, which are expected to become operational after July 1, 2041, or integrate with a system that provides claims processing.
- B. **Family Engagement & Two-Way Communication** - The vendor will be expected to have the capability to integrate family engagement and two-way communication with a centralized data management system, with messaging guidance from OTT. This may include partnership with another organization. The integrated system will have the ability to, at a minimum:

- Enable and monitor two-way communications with the ability to answer questions, address concerns, update data, and provide personalized support through an individualized Baby Bonds customer response system created and supported by the respondent.
- Track inbound inquiries (via phone, mail, email, or online forms).
- Receive, analyze and respond to claims from families who believe they should qualify for the program, but were left out for any number of reasons.
- Generate regular reports for the state agency on engagement levels, issues raised, resolution times, and program outcomes.
- Facilitate clear, timely updates and feedback loops among all parties.

C. Direct Mailing & Communications with Program Participant Families - The vendor will be expected to have the capability to conduct phased outreach at the direction of OTT in conjunction with its family engagement capacity. This may include partnership with another organization. Such outreach should include the ability to, at a minimum:

- Manage secure, multi-channel outreach and response processes, including the ability to print and mail letters to families.
- Maintain an in-state CT mailing address to receive written communications and returned mail, which can be tracked and integrated in the data management system.
- Design, implement, and manage a multi-channel outreach strategy (mail, email, SMS, phone, web, portals) to notify families about eligibility and benefits.
- Track engagement metrics and adjust strategies for higher participation and retention.

SECTION IV: DESIRED QUALIFICATIONS FOR FUTURE VENDOR

- A. Demonstrated experience providing CRM or data coordination services for government, Medicaid-related programs, or other social services programs
- B. Expertise in HIPAA compliance, data privacy, state privacy laws, and best practices for secure and confidential communications
- C. Proven experience managing communications for state agencies or large-scale public programs involving sensitive populations
- D. Capacity to scale operations and manage sustained, high-volume inquiries
- E. Technical capacity to provide real-time reporting and manage access to sensitive information
- F. Familiarity with culturally responsive outreach in low-income or Medicaid-enrolled communities
- G. Ability to work collaboratively with multiple stakeholders, including government, non-profits, and families

SECTION V: RFI DISCLAIMER

- A. This RFI is issued for informational and planning purposes only and does not constitute a solicitation. A response to this RFI is not an offer and cannot be accepted by OTT to form a binding contract.
- B. Respondents are solely responsible for all expenses associated with responding to this RFI. OTT is not liable for any costs incurred by Respondent in the preparation and evaluation of responses submitted.
- C. If applicable, samples of items required must be submitted to the location and by the date and time specified, at no expense to OTT.
- D. Participants are advised that the responses to this RFI are the property of the State and may be subject Connecticut's Freedom of Information Act (FOIA).
- E. Please do not include any proprietary information in response to this RFI.
- F. Responding to this RFI creates no obligation on the part of any Respondent to OTT. Conversely, issuing this RFI and considering the responses creates no obligation on the part of OTT to any Respondent.
- G. OTT asks willing Respondents to share non-binding budgetary pricing information for each referenced system where requested. Pricing is only for planning and market research purposes. Any pricing provided in response to this RFI will not be considered a proposal/bid on the part of the respondent.

SECTION VI: SUBMISSION REQUIREMENTS

Respondents should submit an information package that includes the following:

- A. Executive Summary
- B. Organizational Overview
- C. Description of Approach and Technical Capabilities
- D. Examples of Similar Work
- E. Proposed Platform or Technology
- F. Cost Framework or Estimate
- G. List of potential responding partners or subcontractors

SECTION VII: SUBMISSION INSTRUCTIONS

Responses must be submitted electronically in PDF format to baby.bonds@ct.gov by 11:59PM EST on August 25, 2025.

Subject Line: Response to RFI OTT-BB-2025-01: [Organization Name]

SECTION VIII: TIMELINE

Milestone	Date
RFI Release	July 21, 2025
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Responses to Questions are Posted	August 15, 2025
RFI Response Date	August 25, 2025

All questions about this RFI must be submitted PDF by August 8, 2025 to baby.bonds@ct.gov.
Answers will be posted on the site below by August 15, 2025:
<https://portal.ct.gov/ott/doing-business/requests-for-information-proposals-bids>

SECTION IX: ADDITIONAL INFORMATION

This is not a solicitation. All materials submitted will be subject to Connecticut's Freedom of Information Act (FOIA).