

Center for Arkansas Legal Services

Case Management Software Request for Proposal

Issue date: February 20, 2020

Due date: March 19, 2020

1. **Invitation** The Center for Arkansas Legal Services (CALs) is inviting proposals for the provision of case management software (CMS).
2. **Introduction** CALs is a 501(c)(3) non-profit that provides free legal assistance to domestic violence victims, children, senior citizens, veterans, and low-income Arkansans. CALs helps thousands of Arkansans every year with the legal issues that threaten their ability to obtain the basic necessities of life, such as food, shelter, health care, and education. CALs has 6 offices across the state of Arkansas with nearly 50 employees, including 27 attorneys.
3. **Background** On May 21, 2019, Arkansas experienced record-breaking flooding that continued until the floodwaters receded on June 14, 2019. On June 8, 2019, the President issued a disaster declaration for 13 Arkansas counties: Arkansas, Conway, Crawford, Desha, Faulkner, Jefferson, Lincoln, Logan, Perry, Pope, Pulaski, Sebastian, and Yell. CALs serves the poverty populations in all of these counties with offices located in Jefferson, Pope, Pulaski, and Sebastian counties. In response to the May 2019 flooding, CALs immediately began planning to provide services for the affected communities.

While preparing to implement a successful disaster legal aid plan for flood victims in these counties, CALs recognized the need for a more robust case management system that would allow staff to utilize the software while assisting disaster victims in the rural communities in which they were affected. Other beneficial features of the CMS would include the ability to do online intake; store files and documents directly to client folders in the CMS; upload call recordings, texts, and emails to client folders; and be mobile friendly so staff can access the CMS from tablets, iPads, and/or smart phones.

4. **Scope and Objectives** The purpose of this Request for Proposals (RFP) is to select a qualified CMS provider, implement the software, deliver training to staff, and provide ongoing support to users. Initial provision to 6 locations, with approximately 45 internal users and 500 external (volunteers, contract attorneys) users.

5. Proposal Contents

5.1 Description of responder:

- a. Responder's full legal name;
- b. Responder's head office mailing (for billing) and website address;
- c. Name, telephone number, email address of the responder's designated contact person;
- d. Expertise of the responder, including the core focus of services provided by the responder;
- e. Responder's key staff members;

5.2 Understanding of Project:

Provide a description of:

- a. Responder's understanding of the project should be provided;
- b. Responder's added value and differentiation;

5.3 Technical Requirements:

- a. Provide a description of the proposed product including the following components:
- b. Provide a brief overview of your products, including a summary of functionality, with screen shots where applicable.
- c. Describe your customization and extensibility capabilities.
- d. Describe how the system can be modified once live.
- e. Describe your security practices.
- f. Do you offer your products as Licensed (on premise) or Hosted (in cloud)

5.4 Business Requirements for CMS:

The following are the desired business functions for the CMS. Please ensure your proposal addresses each requirement:

- User-friendly/Intuitive: Easy to use and navigate;
- Ability to set up user permissions based on office and user role;
- Ability to configure and make changes internally;
- Intake system with conflict check;
- Workflow;
- Tasks, To-Do lists, Assignments, shared calendar, reminders;
- Mobile access;
- Timekeeping for client and non-client tasks;
- Search;
- Grant management;
- Calendar, including flags/ticklers/alerts;
- Measure and report on case outcomes;
- Document management, ability to upload and manage documents, document generation;
- Contact management;
- Pro bono management;

- Pro bono/volunteer portal;
- Client portal;
- Contract attorney management;
- Web-based with secure connection and mobile access;
- Online intake portal;
- Always updated to latest version;
- Client eligibility determination and intake screening;
- Conflict checker;
- Reporting capabilities, including compliance with Legal Services Corporation and other federal and state funder reporting requirements. Must update reporting as funder requirements change.
- Ability to create custom reports, standard reports available to all users;
- Data collection for non-case oriented work, i.e. outreach, training, clinics, etc.
- Ability to track call-backs, assign cases, create contacts, notes, alerts, and other activities;
- Email to/from case, ability to use SMS;
- Case outcomes, recoveries, and avoidances;
- Integration with Office 365 and phone system

5.5 Deployment Plan, Training and Support:

Provide a description of:

- a. Outline of deployment methodology;
- b. Data migration from current CMS (KEMPS Caseworks CMS);
- c. User and admin training;
- d. Ongoing support.

5.6 Pricing

- a. Initial acquisition price
- b. Provide pricing for migrating up to 350 fields from KEMPS Caseworks CMS.
- c. Provide pricing for migrating media (video, audio, pictures).
- d. Describe ongoing costs for hosting or maintenance.
- e. Describe any additional ongoing support costs.

5.7 References

- a. Number of current CMS users
- b. Number of Legal Services Corporation grantees, if any
- c. Provide contact information on a minimum of three (3) references

6. Proposal Assessment Process and Criteria All proposals will be evaluated by CALS. Notwithstanding any other provision in the RFP, CALS reserves the right to accept the proposal that it deems in its sole discretion most advantageous and the right to reject any or all proposals without giving any notice or reasons. The proposal having the lowest cost to CALS will not necessarily be accepted.

Proposal Evaluation Criteria

CALS may take into account any criteria it desires, including, without limitation, those listed below (not necessarily in order of importance):

- a. Demonstrated understanding of the project objectives, scope, requirements.
- b. Professional qualifications, reputation, capability, and experience.
- c. Ability to address technical, functional and business requirements.
- d. Cost of the project, including the projected yearly annual costs.
- e. Quality of the proposal.

8. Timelines and Milestone Dates

Request for Proposals issued: February 20, 2020

Request for Proposals due: March 19, 2020

Questions from responders due: March 5, 2020

Questions answered by CALS: March 10, 2020

Vendor demonstrations: February 20 – March 19, 2020

Award date: Pending approval by Legal Services Corporation

Contract date: After May 1, 2020

Project start date: After May 2, 2020

Desired completion date: March 1, 2021

9. Contacts, Inquiries, Clarifications and Submission Please send completed proposals and all inquiries/questions regarding this RFP to:
jrobinson@arkansaslegalservices.org.

CALS will accept submissions as attachments to an e-mail.