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## STRENGTHENING THE VOICES OF CASA STATEWIDE

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# RFP: CASA CASE MANAGEMENT SYSTEM

## SCOPE OF WORK

*CASA programs in Texas are seeking new options for their ongoing case and document management system. These programs recruit, train and supervise Court Appointed Special Advocate (CASA) volunteers to advocate for children involved in the child welfare system. There are currently 74 programs across Texas with programs ranging from covering one county to up to 10 counties. These programs also range in the number of children served, staff members and volunteers. A large portion of the funding for programs comes from state and federal grants which require extensive reporting in addition to the court reports required by the Texas Department of Family & Protective Services. Current issues programs would like addressed with a new system include:*

- Ability to access the system on tablet/mobile devices to make it easier for volunteers to enter data from home without a laptop.*
- Ability to document multiple activity types, i.e. if a volunteer attends court and speaks with the child, plus their case worker and others involved in the case, the volunteer needs to be able to record all of those interactions through one entry by selecting multiple activities. Currently volunteers cannot record all of those interactions at the same time and instead have to report each separately creating inaccurate data and increasing the amount of time it takes volunteers to enter information. Our challenge is to accurately reflect activities without increasing the time it takes volunteers to enter information.*
- Ability to create custom reports as needed without requesting and paying for additional services to build reports.*
- Ability to open and view multiple cases and reports at the same time.*

*Additional requirements and features are outlined below.*



## REQUIREMENTS & MINIMUM STANDARDS

- Minimum security, privacy and data protection requirements as required by the Texas Health & Human Services Commission:
  - AES 256 bit data protection
  - Encryption
  - Does not off-shore
  - Prompted 90 day password reset
  - Password protection (e.g. prohibits weak passwords, 2-step verification, password reset option, etc.)
  - [See all requirements.](#)
- Case management and document management options
- Reliable ongoing support

## QUESTIONS & FEATURES

### Security

- Who has backend access beyond the local program?
  - How are they vetted? Do they require background checks?
- Where is the data backed up and how often? Where is it stored?
- How do you handle encryption?
- Do you require 2-step verification or a verification app?
- Is there password reset option for all users? (Volunteers need access to a reliable password reset button.)
- Can you restrict level of access by users? Can you hide specific cases? Programs would like the ability to mark a case as sensitive/private so only selected people have access even if it is searched for. Potentially only the person who created the case or marked it as sensitive would be able to delegate/share access.

### Capabilities

- Is there the ability to write custom reports?
- Can entry fields be required? Can fields also be locked?
- If volunteers miss a field, will they be notified before submitting?
- Are there "cross check" reports that help programs identify data entry errors or fields missing data?
- How could we record multiple activity types? Example listed above in SOW.



- Does the system connect to Salesforce or can the information be easily input to Salesforce?
- How user-friendly is the system? How many clicks/steps to access or input information?
- What is the navigation setup of the system?
- Can information be linked across cases? Multiple youth may be staying at the same placement so is there a way to look up the placement and all of the related cases?
- Can users view documents within the system without downloading them to a device? Can certain documents be restricted/not downloadable? (Some files need to be downloaded while others are confidential and must remain in the system only.)
- What is the maximum file size a file for upload?
- What is the maximum storage capability? Are there fees for exceeding the limit?
- Is the platform available for tablet and mobile devices?
- Where are documents stored in the system and how are they organized? Are they searchable?
- What is the time limit before users are logged out of the system?
- Can automated notifications be enabled? Ex: Once a volunteer completes a report, their supervisor should receive a notification. Can users be tagged and notified in reports i.e. @user?
- Can you schedule reports/notifications? Would like for a way to see which court dates or other deadlines are coming up soon.
- Does system link to a calendar system?

### **Contract Terms**

- What is the cost/pricing and how is it calculated, i.e. monthly or yearly basis, by number of users, plus data storage? Is this a standard rate or best current offer? How long is offer available? Any additional fees?
- When was the last time prices increased? Are these expected to increase yearly?
- Term of contract – how often does it renew? Who can cancel? Yearly?
- Could a joint contract be made with multiple programs?

### **Support**

- Number of employees/how do you provide customer support? Is there direct access to a help desk vs submitting a ticket?
- How is the onboarding process handled?



- How would you handle the conversion process and migrating data over to new system?
- Are there trainings available? Is there a cost associated with this? Is this ongoing (with turnover in staff)? What type of training is available?

### **Additional Features (Y/N)**

- Auto save
- Text boxes with unlimited characters/words (if N, include limit)
- Back button

### **Additional Questions**

- What is your experience with CASA and/or the child welfare system?
- What is your experience with case management software?
- Describe your customer service?
- How often and when do you upgrade your software?

## **HOW TO RESPOND**

Please submit the following no later than close of business on December 8, 2023 to [contracts@texascasa.org](mailto:contracts@texascasa.org).

Response should include:

1. Answers to all questions above.
2. At vendor's discretion, if you have additional information you would like to provide beyond the requested questions please include.
3. A budget for the system outlined above.
4. A description of the timeline needed to set up system, migrate data and train staff.

For questions regarding the proposal, please email Contracts & Project Manager Caitlyn Perdue at [contracts@texascasa.org](mailto:contracts@texascasa.org).