



YMCA of Greater Houston
Request for Proposal
RFP 24-001: Client Management System

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I. Introduction and Information for Vendors

The YMCA of Greater Houston (the “YMCA”) is a 501c3 non-profit organization dedicated to improving the quality of life through programs that promote healthy living, youth development, and social responsibility. The YMCA in the greater Houston area includes operations in over 20 facilities with fitness, sports, and aquatic programming; nearly 200 local schools providing before and after school care for children; 9 preschools and early care programs; one resident camp in Trinity, Texas; and various caring community sites, providing various outreach services to meet the needs of the community including but not limited to food distribution and pantry services, youth enrichment activities and social service programs. The YMCA also provides programming for senior citizens, teens, and people with special needs.

Through YMCA International Services Center, the YMCA aids refugees and immigrants during their resettlement journey in the form of legal assistance, employee development and training, and childcare assistance via federal funds restricted for these purposes. YMCA International Services, founded in 1978, delivers client-centered programs to refugees, immigrants, and other vulnerable populations to advance their economic independence, social integration and civic participation. As the years have gone by, client demographics may have changed, but the YMCA is still providing support for refugees, immigrants, and vulnerable populations in the greater Houston area. The Y helps newcomers restore hope, build stability, create opportunity and change futures.

The YMCA International services offer the following programs.

- Refugee Reception and Placement - Initial resettlement including housing, cultural orientation, health screenings, school enrollment and the development of a self-sufficiency plan.
- Social Adjustment / Case Management - Identify and remove barriers to self-sufficiency.
- Medical Case Management - Intensive case management for acute or chronic medical conditions that represent a significant barrier to self-sufficiency.
- Refugee Cash Assistance Program - Short term housing and cash assistance that provides support to eligible clients.
- Refugee Youth Mentoring - Serves refugee youth (ages 18-24) who are interested in working with mentors to improve their lives through educational and career advancement.
- Employment Case Management - Assess job skills and interests to create an employment plan.
- Job Placement - Identify specific employment opportunities and facilitate the transition into the U.S. workforce. Assist with job upgrades to secure employment with better pay and benefits.
- Job Readiness - Orient refugees on ways to seek employment opportunities on their own behalf.

- Career Enhancement - Funding and referral to short- term vocational training and professional re-certification programs to enhance employment opportunities.
- Civics Education - Structured classes to prepare Legal Permanent Residents for citizenship interview and exam.
- Pre-GED Classes - Remedial classes to prepare newcomer students for standard GED program.
- Cultural Orientation - Educate newcomers about culture and systems in their new community.
- Older Adult Refugee Program- Provides refugees over age 60 an opportunity to build community through games, learning and preparing for citizenship.
- Home Studies - Assess that children who are released from government custody enter into a safe and sanitary environment, ensuring they will not be further victimized or traumatized while their immigration case is decided.
- Post Release Services - Ensure released children's medical, physical and emotional needs are addressed through referrals and direct case management services.
- Unaccompanied Minors Program - Provides high-quality, child- friendly, comprehensive immigration legal services to detained and released immigrant youth. Services include Know Your Rights orientations, direct representation before USCIS and EOIR and case management support.
- Comprehensive Services for Victims of Human Trafficking – Victim centered, trauma informed case management for both foreign born and domestic victims of human trafficking.
- Counseling - Mental and behavioral health counseling with a dedicated full- time Licensed Professional Counselor.
- Child Sex Trafficking Victim Advocate Program - Advocates assigned to identified victims to support them in the recovery process as they address the physical, social and emotional impact of trauma.
- Naturalization - The YMCA offers a robust citizenship and naturalization program. Legal permanent residents receive pro bono legal representation as they apply for citizenship (N-400). Supportive services are available through this project to assist with preparing for the citizenship exam.
- Low Cost and Pro Bono Immigration Legal Consultations and Services - Full representation is available for refugee, asylee and family-based immigration petitions, applications for adjustment of status, asylum and employment authorization.
- Unaccompanied Minors Program - Provides high-quality, child- friendly, comprehensive immigration legal services to detained and released immigrant youth. Services include Know Your Rights orientations, direct representation before USCIS and EOIR and case management support.

- Legal Orientation and Education Program - Provides comprehensive "Know Your Rights" orientations and robust support to adults in immigration removal proceedings detained in four Houston area detention centers.
- Immigration Court Representation - YMCA attorneys provide direct universal representation in removal proceedings for Harris County residents.
- Survivors of Crime - Targeted legal services to immigrant survivors of crimes, specifically survivors of human trafficking (T visas), other types of crime (U visas) and individuals eligible for relief under the Violence Against Women Act (VAWA).
- Afghan and Ukrainian Legal Services - The YMCA provides comprehensive pro bono legal and case management services for Afghan and Ukrainian nationals, their spouses and immediate family members. Services include applications for Asylum, Temporary Protected Status, Special Immigrant Visas, Employment Authorization, Refugee and Asylee-based Benefits.

II. Statement of Request

The YMCA is seeking a case management system to support its work with clients in the community and manage the daily functions of the center. The current case volume is about 8,000 and is supported by 300 YMCA employees. The selected vendor will need to provide support in evaluating the YMCA's current process, advising on system design, evaluating ways to optimize work for efficiency, training staff on use of the system, completing testing, and assisting with fully launching the new system for use. A system should provide the following desired functions but is not limited to:

1. Record client intake for managing clients and taking assessments. Information should be presented with a modern visual design and have an easy-to-use search function. The system should support accurate intakes by catching errors and preventing duplicate records.
2. Can take case notes and meeting details from case managers about clients. Information should be trackable within the client's file and able to be reviewed with a search function.
3. Customizable to contain multiple programs that clients may be enrolled in.
4. Support internal referrals between programs and have a workflow that can be tracked. Case managers will refer clients to programs and will need to support a request process.
5. Maintain a historical record of client assistance which could include food, donated items, and financial support.
6. Contain a workflow for requesting and approving support needs for clients by case managers.
7. Accommodate a workflow for requesting financial support for clients. Data will need to be exportable to an external ERP for check writing. The file should contain the payee's name, amount, comments, and the financial GL coding that is tied to the related

program. The payee may be the client or a vendor. A list of preapproved vendors should be available for selection. The vendor list will be maintained by the external ERP.

8. Can generate acknowledgment vouchers for clients and managers to sign off on when direct cash assistance is provided. Caputring digital signatures would be preferred.
9. Ability to complete case documents digitally and can be maintained with the client's file. Predesigned documents should be available for selection within the system based on the program the client is enrolled in. These should have the ability to capture any signatures digitally.
10. Can import external documents for attaching to a client's file that can be saved for review.
11. Allow case managers to create appointments and the ability to send reminders to clients.
12. Can check-in clients for meetings with case managers. This can be done with barcodes, ID cards, or through a kiosk check-in.
13. Reporting capabilities for tracking metrics of clients served, support provided, and overall performance of programs. Details will be presented internally and to external funders.
14. Supported as a SaaS (Software as a Service) solution with the ability for SSO access through Azure.
15. Provide customer support to resolve system issues, assistance with utilizing the platform, training on system enhancements, and SLA terms that support a reliable site.
16. Documents, attached files, and client records should be backed up and secured.
17. Support custom file creations that can be exported for review or to external systems through (.csv) or (.xlsx).
18. Options for integration with HRIS provider and ERP through SFTP (Secure File Transfer Protocol) or other similar connections.
19. Can import historical data from the current system for retaining information and continuing support to current clients.

III. Proposal Submission Instructions

Please complete the following documents and submit each in PDF format (accompanied by any applicable attachments):

DOCUMENT 1 – Partner Responses

DOCUMENT 2 – Disclosure of Potential Conflict of Interest

DOCUMENT 3 – Certification Regarding Debarment, Suspension and Other Responsibilities

To be eligible for consideration, please submit your proposal as follows:

Method:

via e-mail

Sean Cawthon

Executive Director of Finance

sean.cawthon@ymcahouston.org

Due Date: Friday, July 26, 2024
5:00 PM CST

Proposals received after this time will not be considered. Amendments or additional information will not be accepted after the submission deadline unless requested by the YMCA.

The proposal must be submitted with “Proposal for Services” included in the subject line of the email. An accompanying transmittal letter must be signed by an individual authorized to contractually bind the submitting firm, and must indicate that the proposal is valid for 180 days from the submission date. It must also state full agreement with the conditions and requirements included herein, and give full contact information for questions regarding the proposal.

There is no limit to the physical size of the proposal, but a complete yet succinct, and unambiguous presentation is expected. Proposals should provide a clear and straightforward description to enable the YMCA to evaluate the proposal with little to no follow-up clarification needed.

Withdrawal of proposals will be accepted up to the date and time of submission noted above, and should be submitted via the same method described above. Any organization submitting a proposal is deemed to have read, understood and agreed to all terms, conditions, and requirements set forth in this RFP.

The selection may be made on the basis of the proposals as initially submitted, without discussion, clarification or modifications. The YMCA reserves the right to request further information as needed. The YMCA reserves the right to enter into negotiations for terms as part of the evaluation.

The YMCA will select a partner based on the responses provided. Award will not be made based solely on any one element of the proposal, but instead based on the most responsive and advantageous proposal submitted.

IV. Proposal Selection Timeline

The timeline for award is as follows:

RFP Available to Public – Posted on YMCA Website	June 9, 2024
Partner Proposals Due via Email	July 26, 2024
Evaluations	July 29, 2024
Anticipated Contract Award Date	August 12, 2024