



YMCA of Greater Houston  
Request for Proposal  
RFP 26-001: 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 the YMCA's Community Impact Services, the YMCA aids refugees and immigrants during their resettlement journey in the form of legal assistance, employee development and training, and childcare assistance with support from federal funds restricted for these purposes.

YMCA Community Impact Services 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 these clients in the greater Houston area. The YMCA helps newcomers restore hope, build stability, create opportunities, and change futures.

The YMCA Community Impact Services offer the following programs.

### **Community & Family Resiliency Services**

- Family Stability - The Siemer Institute Family Stability Program is a national model to help families avoid homelessness and stay stable. The program focuses on keeping families in their homes and children in their school. The purpose is to avoid frequent moves that seriously harm education and well-being. A stability plan is created with each client to set goals around housing, income, and education.
- United Way - The Navigation integrated client journey allows a client to create their own customized pathway based on their goals and needs. Rather than working separately to address individual needs, programs are orchestrated to make it easy for clients to engage across services as needed, breaking down barriers and helping ensure clients can be successful.
- Workforce Development - The YMCA of Greater Houston's Pathway to Resiliency Workforce Program provides targeted workforce development services for unemployed and underemployed individuals who are identified as "the working

poor” through ALICE (Asset Limited, Income Constrained, Employed) and residents of communities with a higher rate of people living below the federal poverty threshold.

### **Immigration Youth Services**

- Home Studies & Post Release Services - HS 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. PRS ensures that released children's medical, physical, and emotional needs are addressed through referrals and direct case management services.
- Unaccompanied Children Program, Legal - Provides high-quality, trauma-informed, and 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 assistance with immigration applications to promote safety and long-term stability.

### **Victim Assistance & Advocacy**

- Comprehensive Services for Victims of Human Trafficking - Victim centered, trauma informed case management for both foreign born and domestic victims of human trafficking.
- Counseling - The counseling program's licensed therapist collaborates with frontline staff to provide therapy and psychoeducational sessions for trafficking victims and their families. The program also addresses barriers to comprehensive therapy for both victims and their families, including issues related to stigma.
- Child Sex Trafficking Victim Advocate Program - Advocates provide victim-centered, trauma-informed case management 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. Survivors of Crime, Legal - 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).

- Housing Assistance Program - The YMCA of Greater Houston's Trafficked Persons Housing Assistance Program supports survivors of human trafficking by promoting holistic recovery and long-term housing stability. The program secures safe, stable housing and provides integrated, trauma-informed supportive services tailored to each individual's needs.

## **II. Statement of Request**

The YMCA is seeking a centralized client services platform capable of supporting case management workflow, assistance tracking, grant reporting, and cross-program service coordination across multiple federally funded and privately funded programs. The current case volume is about 400 and is supported by 40 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 the use of the system, completing testing, and assisting with fully launching the new system for use. Expectations of implementations should support the YMCA with a discovery approach, configuration vs customization strategy, migration timeline, training model, change management support, sandbox availability, testing phases, and rollout approach (pilot vs org-wide) to ensure a successful launch of the new system.

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 by the supporting staff. 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. Ability to track the distribution of donated items to clients and keep an internal inventory of those items for distribution. Items should have the ability to assign a value that can be recorded as client assistance and available for match grant reporting.
7. Contain a workflow for requesting and approving support needs for clients by case managers.
8. 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, and the vendor list will be maintained by the external ERP. Each check will need to have an acknowledgment voucher generated for the client and manager to sign when direct cash assistance is provided. Capturing 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. The reporting should be able to support the need for federal grants, VOCA, ORR, United Way, private foundation outcomes, match tracking, service duplication prevention, demographic segmentation, or longitudinal client outcomes.
14. Supported as a SaaS (Software as a Service) solution with the ability for SSO access through Azure. SOC2 certification will require and a copy should be made available.
15. Provide customer support to resolve system issues, assist with utilizing the platform, train 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. YMCA retains ownership of all data stored within the system and must have the ability to export all data in usable formats upon request or contract termination.
20. The system must support compliance with:
  - HIPAA (if applicable to counseling components)
  - FERPA (if youth education records are involved)
  - ORR requirements (unaccompanied minors)
  - DOJ/VOCA/TX state grant reporting compatibility
  - Role-based access controls
  - Audit logs
  - Encryption at rest and in transit

### **III. Evaluation**

Proposals will be evaluated based on:

- Functional fit
- Experience supporting client case management/ human services organizations
- Reporting capabilities for grant-funded programs
- Implementation approach
- Integration capability with existing systems
- Security and compliance posture
- Cost structure
- Ongoing support model

### **IV. 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, May 8<sup>th</sup>, 2026 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.

#### **V. Proposal Selection Timeline**

The timeline for award is as follows:

RFP Available to Public - Posted on YMCA Website	April 13, 2026
Partner Proposals Due via Email	May 8, 2026
Evaluations	May 15, 2026
Anticipated Contract Award Date	May 29, 2026