REQUEST FOR PROPOSAL

Integrated Case Management and Information Referral System

Collier Resource Center

Issue Date: Thursday, December 18, 2025

Proposal Due Date: Wednesday, January 14, 2026

Contact: Collier Resource Center

1. Executive Summary

The Collier Resource Center is seeking proposals from qualified vendors to provide a comprehensive, integrated software solution that combines case management capabilities with an advanced information and referral system. This solution must support our mission to connect community members with essential social services through multiple access channels, including web-based interfaces, automated telephone systems, and text messaging.

The ideal solution will streamline our case management operations, enhance service delivery, improve client outcomes tracking, and provide real-time transparency through public-facing statistical dashboards. This RFP outlines our requirements, evaluation criteria, and proposal submission guidelines.

2. Organization Overview

The Collier Resource Center serves as a vital hub connecting individuals and families with comprehensive social services throughout Collier County. Our organization coordinates with numerous service providers, non-profit agencies, and government programs to ensure community members receive appropriate assistance for their needs.

Our current operations include intake processing, needs assessment, service referrals, case tracking, and outcome monitoring. We serve thousands of clients annually and maintain partnerships with dozens of service provider organizations across multiple program areas including housing assistance, food security, healthcare navigation, disaster recovery, and more.

3. Project Objectives

The primary objectives of this project are to:

- Implement an integrated platform that unifies case management and information referral functions
- Provide multi-channel access to services including web, phone, and text messaging
- Streamline client intake, assessment, and service coordination processes
- Enable comprehensive tracking of referrals, follow-ups, and service outcomes
- Enhance client engagement through automated appointment reminders and targeted notifications
- Provide public transparency through embeddable real-time statistics dashboards
- Generate comprehensive reports supporting grant applications, outcomes measurement, and organizational decision-making

4. Scope of Work

The selected vendor will provide a comprehensive software solution with the following core components:

4.1 Case Management System

The case management module must include:

1. **Client Profile Management:** Secure storage of client demographics, contact information, household composition, and case history with appropriate privacy controls and data security measures.
2. **Case Tracking:** Complete lifecycle tracking from initial intake through service delivery and case closure, including status updates, timeline views, and milestone tracking.
3. **Referral Management:** Documentation of referrals made to external service providers, including referral date, organization, services requested, and referral status.
4. **Follow-up Tracking:** Scheduling and documentation of client follow-ups, including automated reminders for staff, follow-up status, and outcomes documentation.
5. **Service Value Tracking:** Quantification and tracking of the monetary value of services received through referrals, supporting outcomes measurement and impact reporting.
6. **Appointment Scheduling:** Integrated calendar system for scheduling client appointments with automatic email and text message reminders sent to clients prior to scheduled appointments.
7. **Notes and Documentation:** Comprehensive note-taking capabilities with timestamp, user attribution, and searchable text fields for case documentation.
8. **Document Management:** Secure attachment and storage of case-related documents, forms, and supporting materials.

4.2 Information and Referral System

The information and referral component must provide:

9. **Comprehensive Resource Database:** Searchable database of community services and resources, including organization details, service descriptions, eligibility criteria, contact information, and availability.
10. **Categorization and Taxonomy:** Organized resource classification system using standard taxonomy categories for easy navigation and search functionality.
11. **Web-Based Search Interface:** User-friendly public-facing website allowing clients and community members to search for services by category, keyword, location, and eligibility criteria.
12. **Automated Telephone System:** Interactive Voice Response (IVR) system enabling callers to search for resources by category using touch-tone or voice commands, with the ability to have resource information read aloud or texted to their phone.
13. **SMS Text Response:** Capability to send resource information via text message based on caller selection through the phone system or through direct text inquiry.

14. **Resource Maintenance Tools:** Administrative interface for staff to add, update, and maintain resource listings with version control and change tracking.

4.3 Communication and Notification System

The system must support targeted client communications:

15. **Client Preference Management:** Allow clients to select specific need categories or topics of interest for receiving updates and notifications.
16. **Blast Notifications:** Capability to send email and text message notifications to groups of clients based on their selected preferences and needs categories.
17. **Appointment Reminders:** Automated email and text message reminders for scheduled appointments, with configurable timing before appointments.
18. **Opt-In/Opt-Out Management:** Compliance features allowing clients to manage their communication preferences and unsubscribe options.
19. **Delivery Tracking:** Reporting on message delivery status, open rates for emails, and engagement metrics.

4.4 Public Statistics Dashboard

The solution must provide public transparency through:

20. **Real-Time Data Visualization:** Live dashboard displaying current statistics on clients served, services provided, referrals made, and program outcomes.
21. **Embeddable Widget:** HTML embed code or iframe functionality allowing the dashboard to be integrated into the organization's website and partner websites.
22. **Customizable Metrics:** Administrative control over which metrics and data visualizations appear on the public dashboard, with the ability to create multiple dashboard configurations.
23. **Privacy Protection:** Aggregated data presentation that protects individual client privacy while providing meaningful organizational transparency.
24. **Responsive Design:** Dashboard functionality across desktop, tablet, and mobile devices with appropriate scaling and readability.

4.5 Reporting and Analytics

The reporting system must include:

25. **Standard Reports:** Pre-configured reports for common organizational needs including client demographics, service utilization, referral patterns, and outcomes measurement.
26. **Advanced Report Builder:** Flexible report creation tool allowing staff to design custom reports with user-defined parameters, filters, groupings, and calculations.
27. **PDF Export:** High-quality PDF generation of all reports with professional formatting suitable for grant applications, board presentations, and external stakeholder distribution.

28. **Scheduled Reports:** Automated report generation and distribution on recurring schedules with email delivery to specified recipients.
29. **Data Export:** Export capabilities to common formats including Excel, CSV, and other standard formats for further analysis.
30. **Grant Reporting Templates:** Support for common grant reporting requirements including HMIS compatibility for homeless services funding, FEMA reporting for disaster assistance, and standard United Way reporting formats.

5. Technical Requirements

5.1 System Architecture

- Cloud-based solution with guaranteed uptime of 99.5% or higher
- Scalable architecture supporting organizational growth and increased user load
- Web-based interface accessible through modern browsers without specialized software requirements
- Mobile-responsive design for access on smartphones and tablets
- API availability for integration with other organizational systems

5.2 Security and Compliance

- Data encryption in transit and at rest
- Role-based access control with granular permissions
- Audit logging of all data access and modifications
- Regular security assessments and penetration testing
- Multi-factor authentication support
- Compliance with relevant federal and state privacy regulations

5.3 Data Management

- Automated daily backups with point-in-time recovery capabilities
- Data import capabilities from existing systems
- Data retention policies configurable to organizational needs

5.4 User Experience

- Intuitive interface requiring minimal training
- Accessibility compliance with WCAG 2.1 Level AA standards
- Multilingual support for client-facing components
- Customizable fields and workflows to match organizational processes

6. Implementation and Support

6.1 Implementation Services

The vendor must provide:

- Detailed implementation plan with timeline and milestones
- Data migration services from existing systems
- System configuration and customization to organizational requirements
- Integration of telephone system with existing phone infrastructure
- User acceptance testing support
- Go-live support and transition planning

6.2 Training

- Comprehensive training for administrative staff
- Role-based training for case managers and support staff
- Training documentation and user guides
- Video tutorials and online learning resources
- Train-the-trainer sessions for organizational sustainability

6.3 Ongoing Support

- Technical support availability during business hours (minimum)
- Help desk with ticketing system for issue tracking
- Documented service level agreements for response and resolution times
- Regular system updates and security patches
- Dedicated account manager or client success representative
- Access to user community and knowledge base

7. Proposal Requirements

Vendors must submit proposals that address all sections outlined below. Proposals should be thorough, well-organized, and demonstrate the vendor's understanding of our requirements and organizational context.

7.1 Executive Summary

Provide a concise overview of your proposed solution, highlighting key features and your organization's qualifications to deliver this project.

7.2 Company Background

- Company history and years in business
- Number of employees and organizational structure
- Financial stability and business continuity planning
- Relevant certifications and industry recognition
- Experience serving non-profit organizations and social service agencies

7.3 Solution Description

- Detailed description of how your solution meets each requirement in Section 4 (Scope of Work)
- Technical architecture and infrastructure overview
- Product screenshots and user interface demonstrations
- Integration capabilities and API documentation
- Customization options and limitations
- Product roadmap and planned enhancements

7.4 Implementation Plan

- Detailed implementation timeline with phases and milestones
- Resource requirements from Collier Resource Center
- Risk assessment and mitigation strategies
- Data migration approach and timeline
- Testing and quality assurance procedures

7.5 Training and Support Plan

- Training methodology and schedule
- Ongoing support model and service level agreements
- Documentation and learning resources provided
- Support escalation procedures

7.6 Client References

Provide at least three references from organizations of similar size and mission that are currently using your solution. Include organization name, contact person, phone number, email, implementation date, and a brief description of their use case.

7.7 Pricing

Provide detailed pricing information including:

- One-time implementation costs
- Recurring subscription or licensing fees (monthly or annual)
- User-based or tiered pricing structure
- Training costs
- Support and maintenance fees
- Any additional costs (customization, integrations, data migration, etc.)
- Volume-based or usage-based fees (phone calls, text messages, etc.)
- Payment terms and schedule

7.8 Contract Terms

- Proposed contract length and renewal terms
- Termination provisions and data portability guarantees
- Service level agreements and performance guarantees
- Intellectual property rights and data ownership
- Limitation of liability and indemnification provisions

8. Evaluation Criteria

Proposals will be evaluated based on the following weighted criteria:

1. **Functional Requirements (30%):** Extent to which the proposed solution meets all specified requirements in Section 4, with particular emphasis on the integration of case management and information referral systems, automated phone capabilities, and public dashboard features.
2. **Technical Capabilities (20%):** System architecture, security measures, scalability, integration capabilities, and compliance with technical requirements outlined in Section 5.
3. **User Experience (15%):** Ease of use, interface design, accessibility features, and overall user satisfaction as demonstrated through references and product demonstrations.
4. **Implementation and Support (15%):** Quality and comprehensiveness of implementation plan, training offerings, ongoing support structure, and documented service level agreements.
5. **Cost and Value (15%):** Total cost of ownership including initial implementation, recurring fees, and long-term value proposition relative to functionality provided.
6. **Vendor Qualifications (5%):** Company stability, relevant experience, client references, and track record of successful implementations in similar organizations.

The evaluation committee reserves the right to request demonstrations, conduct site visits to reference clients, and request additional information during the evaluation process. Selection will be based on the proposal that represents the best overall value to the Collier Resource Center, not necessarily the lowest cost.

9. Submission Instructions

9.1 Proposal Format

- Submit proposals in PDF format
- Include table of contents with section references
- Use standard fonts and formatting for readability
- Page limit: 50 pages maximum (excluding appendices and supporting materials)

9.2 Submission Method

Electronic submissions should be sent to: ashley@collierresourcecenter.org

Subject line: RFP Response - Case Management and Information Referral System

9.3 Submission Deadline

Proposals must be received no later than Wednesday, January 14, 2026, at 5:00 p.m. ET. Late or incomplete submissions will not be accepted.

9.4 Questions and Clarifications

Questions regarding this RFP must be submitted in writing to ashley@collierresourcecenter.org no later than Monday, December 29, 2025, at 12:00 p.m. ET. Responses to all questions will be shared with all registered vendors by Tuesday, January 6, 2026, at 5:00 p.m. ET.

Vendors are encouraged to register their interest by emailing ashley@collierresourcecenter.org to ensure receipt of any amendments or clarifications to this RFP.

10. Selection Timeline

The anticipated timeline for this procurement process is as follows:

- RFP Release: Thursday, December 18, 2025
- Question Deadline: Monday, December 29, 2025
- Answers Published: Tuesday, January 6, 2026
- Proposal Due Date: Wednesday, January 14, 2026
- Finalist Demonstrations: Monday January 19 – Friday January 23, 2026
- Vendor Selection: Tuesday, January 27, 2026
- Contract Negotiation: Tuesday January 27 – Friday February 13, 2026
- Target Implementation Start: Monday, March 2, 2026

This timeline is subject to change at the discretion of the Collier Resource Center. All vendors will be notified of any changes to the schedule.

11. Terms and Conditions

11.1 Right to Reject

The Collier Resource Center reserves the right to reject any or all proposals, to waive irregularities or informalities in any proposal, to accept or reject any item or combination of items, and to award the contract in whole or in part as may be deemed in the best interest of the organization.

11.2 Costs of Proposal Preparation

The Collier Resource Center will not be responsible for any costs incurred by vendors in preparing and submitting proposals or for any costs associated with presentations or demonstrations.

11.3 Proposal Ownership

All proposals submitted become the property of the Collier Resource Center. The organization reserves the right to use any ideas presented in any proposal regardless of whether the proposal is selected.

11.4 Confidentiality

Proposals will be kept confidential until a contract is awarded. At that time, proposals may become matters of public record subject to applicable disclosure laws. Vendors should clearly mark any proprietary or confidential information contained in their proposals.

11.5 Non-Discrimination

The Collier Resource Center is committed to equal opportunity and does not discriminate on the basis of race, color, religion, sex, national origin, age, disability, or any other characteristic protected by law. Selected vendors must demonstrate compliance with all applicable federal, state, and local non-discrimination laws and regulations.

11.6 Insurance Requirements

The selected vendor will be required to maintain appropriate insurance coverage including general liability, professional liability, and cyber liability insurance. Specific insurance requirements will be detailed in the contract negotiation phase.

12. Contact Information

All correspondence related to this RFP should be directed to:

Collier Resource Center

Ashley Jones

Executive Director

P. O. Box 110905

Naples, FL 34108

Email: ashley@collierresourcecenter.org

Phone: 239-776-5300

Thank you for your interest in working with the Collier Resource Center.

We look forward to reviewing your proposal.