

Request for Bid (RFB) for Case Management Database Design

March 12, 2018

I. Introduction and Project Purpose

The Center for Self-Sufficiency incorporated as a nonprofit organization in 2005 and the majority of individuals we serve are low-income African-American and Hispanic youth and adults living in the Greater Milwaukee and Southeastern Wisconsin region. Our mission is to provide a foundation for people to actualize their hope and motivation to access a good life. Our vision is community revitalization through individual transformation. CFSS has 13 years of experience in developing, operating and evaluating programs to strengthen families in the areas of teen pregnancy prevention, healthy relationship education, youth character development and mentoring, fatherhood, workforce development and offender reentry services.

CFSS is located on the second floor of the Community Advocates Building at 728 N. James Lovell Street, Milwaukee, Wisconsin. There are 23 staff members (21 full-time, 2 part-time), and 2 of these staff members work off site. The organization currently uses various data collecting programs required by funding sources for reporting purposes, however CFSS does not have an in-house system for collection of its combined program related data.

The purpose of this RFB is to identify organizations that provide software that allow efficient collection of case management data and to select an organization among these that can provide a cost-effective method for doing so.

II. Requirements / Scope of Services

1. Handle referral and In-take data collection in either a centralized environment or at the program level at CFSS location.
2. Extensive problems/needs assessment at the intake level automatically by application.
3. Document referrals to an external or internal source, complete with a corresponding reason(s) for the referral.
4. Document problems related to outside referrals & follow-ups on single screen.
5. Maintain referral source listings, complete with the ability to record unlimited contact names per referral source.
6. Link referral source to individual agency programs.
7. Flag referral sources as internal or external.
8. Track referrals with “pending” status.
9. Easily store and manage waiting lists for each Grant or Program.
10. Offer the ability to track and manage each referral status separately.
11. Record and track key client variables. Scan all supporting document for each client application.

12. Capture important demographic information at the beginning of each process.
13. Record family members and collateral contacts for referred clients.
14. Classify referral priorities (i.e. urgent, emergency or routine).

III. Bid Submittal Deadline

Responses to this RFB must be submitted by Friday, April 13, 2018 by 5:00 p.m. Bids may be sent electronically to Dafi Dyer, Chief of Staff & Executive Assistant to the CEO, at dafi.dyer@centerinc.org or mailed/delivered to her attention at Center for Self-Sufficiency, 728 N. James Lovell Street, Milwaukee, WI 53233.

IV. CFSS Contact

If you have questions, please contact LaKesha Reid, Director of Adult Revitalization Services, at lakesha.reid@centerinc.org or 414-270-4679.