

# MANATEE COUNTY GOVERNMENT NONCOMPETITIVE INTENT TO AWARD

<b>SUBJECT</b>	Software Subscription and Professional Services Agreement	<b>DATE POSTED</b>	MC <u>6/17/15</u> 58 DS _____ CC _____
<b>PURCHASING REPRESENTATIVE</b>	Matt Donley, 941-749-3062	<b>DATE CONTRACT SHALL BE AWARDED</b>	Upon completion of successful negotiations
<b>DEPARTMENT</b>	Community Services	<b>CONSEQUENCES IF DEFERRED</b>	Continued use of an outdated, mostly manual system that the department lacks the resources to maintain for a sustained period of time
<b>SOLICITATION</b>	Task 20150472	<b>AUTHORIZED BY DATE</b>	Melissa M. Wendel, CPPO Purchasing Official <i>[Signature]</i> 6/16/15

### NOTICE OF INTENT TO AWARD

Noncompetitive Award to CaseWorthy, Inc. to purchase one-time professional services of approximately \$110,000 and ongoing service subscription fees of approximately \$14,000 a year to start with annual increases thereafter.

### ENABLING/REGULATING AUTHORITY

Federal/State law(s), administrative ruling(s), Manatee County Comp Plan/Land Development Code, ordinances, resolutions, policy.

Manatee County Code of Laws

### BACKGROUND/DISCUSSION

The Manatee County Community Services Department is in need of a human services software solution. CaseWorthy, Inc. has a single software application which offers a distinct set of unique qualifiers that satisfy all the department's needs and is delivered in a manner, which cannot be offered in the same way, with the same functionality, by any other known vendor at this time.

<b>ATTACHMENTS</b> (List in order of attached)	<ol style="list-style-type: none"> <li>1. Department Memorandum</li> <li>2. CaseWorthy Statement</li> </ol>	<b>FUNDING SOURCE</b> (Acct Number & Name)	1040015001 546005 <input checked="" type="checkbox"/> Funds Verified <input type="checkbox"/> Insufficient Funds
<b>COST</b>	Approximately \$110,00 in one-time professional service fees plus approximately \$14,000 in annual service subscription fees	<b>AMT/FREQ OF RECURRING COSTS</b> (Attach Fiscal Impact Statement)	

# MEMORANDUM



To: Melissa Wendel, Purchasing Official  
From: Brenda Rogers, Director, Community Services Department  
Date: June 9, 2015 *Brenda Rogers*  
Subject: Preferred Vendor Justification

In our research of vendors for a Human Services Software Solution, we sought specific criteria that is necessary for our programs to succeed. The goal was to find one tool that met all of the criteria. The criteria are:

- Ability to serve as a web based application tool for non-profit grant contracts
- Ability to serve as a web based application tool for benefits programs including prescription benefits, indigent burials, EHEAP and other programs managed in the Human Services Department
- Simplified editing capabilities so that application formats, questions and flows may be updated by staff, without need for additional technical assistance from the vendor, to ensure that the proper data is being collected based on continually changing processes and eligibility standards
- Paperless, off-site record storage
- Simplified reporting mechanism to enable the quick design and compilation of data for presentation to the Board of County Commissioners of other entities as needed
- Ability to track due dates for required documentation submission, including the scheduling and notification of agencies to avoid contract violations
- Ability to build forms and letters for simple mass mailings/e-mailings or individual distribution as required by agreements
- Case note collection and management in the electronic file
- Integration of case reporting tools that will become part of the electronic file
- The future possibility to convert to an electronic request for payment system
- The ability to grant access to our cloud based files (new case files) to internal audit for review from their desktops
- The ability to integrate as many human services processes as possible into the system so that each separate program no longer has its own, distinct software
- Ability to enter client data one time to determine eligibility for multiple programs simultaneously, improving customer service, increasing efficiency and reducing errors
- Capability to expand to other departments if desired
- Accounting integration to aid our fiscal team in properly monitoring funding level balances of non-profit services agreements
- Billing and invoicing provisions which can be used in the management and support of the Department's Aging Services programs and monitoring consulting contracts

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PURCHASING  
MANATEE COUNTY

Community Services Department  
Human Services Division  
1112 Manatee Avenue West, Bradenton, FL 34205  
Phone number: (941)749-3030

- Scheduling capabilities to maintain file and agreement compliance
- The ability to be utilized by partner agencies such as the United Way to avoid the duplication of services

Caseworthy: (<http://caseworthy.com>)

- Meets our criteria as listed above.
- This is the only one researched that is a true “Web Portal” tool that allows the public/non-profit agencies to interact directly with us and to put in their own information. Other tools are more “intake tools” and case management than an all-around tool that will meet all of our needs.

ClientTrack: (<http://clienttrack.com/>)

- Does not include Accounting Integration
- Does not include Billing and invoicing capabilities
- Does not include scheduling
- More of a case/client management tool than an application and contract management database solution

CareDirector: (<http://caredirectorsoftware.com/>)

- Does not include Accounting Integration
- Does not include Billing and invoicing capabilities
- More of a case/client management tool than an application and contract management database solution

Casewatch Millennium:

- Does not include Billing and Invoicing
- Does not include off-site cloud based document management
- Does not have electronic signature capability
- Does not have reporting and statistics capability
- Does not include scheduling

iPlanit: (<http://www.thera.co.uk/iplanit>)

- Does not include accounting integration
- Does not include billing and invoicing capability
- Does not have electronic signature capability
- Does not include scheduling capability

Penelope: (<http://www.athenasoftware.net/>)

- Does not include accounting integration
- Is a case management software geared toward health and social service organizations
- Does not indicate an application component

- Based on site, no government organizations are included in their clients

ETO Software: ([www.socialsolutions.com](http://www.socialsolutions.com))

- Does not include accounting integration
- Does not include Document Management
- It is more of an outcome management tool than a human services application and eligibility/contract and case management tool

cc. Andy Guyre, Human Services Manager  
Mary Pendleton Brown, Fiscal Services Manager

## **CaseWorthy™ Unique Qualifiers for Vendor Selection for Manatee County Community Services Department (MCCSD)**

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The CaseWorthy™ enterprise-wide software application for social services, offers a unique set of features and functionality, that when deployed for MCCSD offers a solution unrivaled in the Health and Human Services industry. While many of the existing software vendors may possess the ability to satisfy a few of the MCCSD needs, only CaseWorthy possesses the software solution to satisfy all of the requirements as outlined. The five (5) areas specifically offered, as listed below, when offered by one vendor, creates a solution that cannot be offered in the same way, with the same functionality, by any other known vendor.

### **CaseWorthy™ Unique Qualifiers:**

- 1) **Fully Functional Outfacing WEB Portal**
  - a. Grant Application, Scoring, Award Management
  - b. Volunteer Application and Approval Management
- 2) **CaseWorthy Analytics AD HOC Flex Reporting**
- 3) **Ability to Interface with the Sungard Accounting System**
  - a. Send Grant Invoices
  - b. Track Grant Fund Balances
  - c. Store and Submit Proof of Expenses
- 4) **Comprehensive Case Management**
  - a. Local Customization with apBuilder™ Toolset
  - b. Eligibility Verification
  - c. Interactive Drilldown Reporting
- 5) **Automated Follow-ups Scheduler**
  - a. Configurable Alerts

### **Fully Functional Outfacing WEB Portal -**

True Portal solutions for the HHS industry are almost nonexistent. Most vendors are rendering forms over the web and calling this solution a portal. At CaseWorthy we have built from the ground up a truly flexible solution that will allow MCCSD to decide what and how communication and data gathering is presented over the portal. What we have created is an extension of our apBuilder™ tools technology that provides complete flexibility. The CaseWorthy™ solutions provides flexibility that range from Kiosk options, Summer Camp sign-ups, Grants Application Management, and Employer/Client Job Match and Volunteer Management. All of these options are handled with the same Portal engine.



The framework that is being utilized to support the Portal is the same framework that has been deployed within the CaseWorthy™ application for years. This approach allows for ease of training since the out-facing (Portal) and internal tools are utilizing the same apBuilders. The combination of the unique business needs (Grant Management and Volunteers) of MCCSD will take full advantage of the portal solution.

Through the WEB Portal, all applicants will be able to access an online application, which will allow Manatee County, (with the assistance of CaseWorthy Professional Services) to customize, and collect all information, and documents, required to complete the application process. Manatee County can decide whether or not, to make applicants go through an applicant approval process, where applicants must be approved to be able to access the Grant Application. Once the application has been submitted, it will land in the CaseWorthy Application, and be scheduled to go through the approval process, as designated by Manatee County.

The CaseWorthy WEB Portal uses simple Workflows, to ensure that all data is collected in a manner that is easy for all applicants to follow, understand, and complete.

### **Grant Management -**

Manatee County will have the following Management Abilities via the WEB Portal:

- **Select Custom Applicant Processes**
- **Manage Data Fields to Capture all relevant and Specific Data**
- **Grant Application Review**
  - Allows for Several Reviewers to Score the Application, on Various Criteria
  - Rank Applicants based on Median Score from all Reviewers
  - Document Annotation, Reviewable by Team
  - Discussion Threads
- **Automated Emails**
  - Inform Applicants of their Application Status
  - Confirm Submission of Requested Materials
  - Send Reminders of Submission Deadlines
- **Grant Fund Management**
  - Track the Balance of all allotted Funds, with Real-Time Drawdown
- **Interface with Accounting Software**
  - Single Entry of Payee Profile Information
  - Submit W-9, Receipts, Proof of Expenses and Justifications Electronically
  - Submit Paperless Invoices to for Payment
  - Receive Payment Information
    - Drawdown on Fund Balances
    - Track Date, and Time of Payment
- **Applicants, and Awardees will have the following abilities via the WEB Portal:**
  - Apply for approval to receive Formal Grant Application
  - Submit Grant Application
    - Attach documents
    - Freeform text response

- Check the Status of their Application
  - Update Applications, and Submit additional Documentation as Requested
- Submit Proof of Expenses
  - Attach Expense Sheets with Justifications
  - Complete Expense Submission Workflow
- Receive Progress Notifications
  - Email
  - WEB Portal Dashboard Notifications

### **Volunteer Management –**

MCCSD has the need to manage their Volunteer Base through an out-facing portal. CaseWorthy™ is capable of deploying this solution that provides all the MCCSD unique need in manage their volunteers. Manatee County will also have the ability to track Volunteer Time, by Volunteer, as well as managing court mandated community service.

The processes for Volunteer Management through the WEB Portal are similar to, and highly configurable, like the Grant Management piece.

#### **Volunteer Management Specific Functionality:**

- Volunteer Event Attendance Tracking
  - Volunteer Time
  - Duties Performed
  - Time Drawdown against Court Mandated, or Committed Hours
  - Track Time per Partner Volunteer Organization
  - Log Absences
- Volunteer Application Approval Processes
- Volunteer WEB Portal Dashboard
  - Allows Client to see all Volunteer Time History
  - Allows Volunteer Event Registration in Calendar View by Location
  - See Future Events Committed to, in a Calendar view

### **CaseWorthy Analytics AD HOC Flex Reporting -**

The CaseWorthy Analytics feature is very unique to our offering. We have been able to tie Cube (ad-hoc) three dimensional views of real-time data directly from the CaseWorthy™ application. This unique approach give the county the ability to push individual client data or entire program data with a simple request through the apBuilders™ technology. This will allow the county to drive most unique date request without the need of the software vendor.

#### **Some high level features**

- Real-time data push at anytime
- Client selectable data for three dimensional views

- Data is protected via the CaseWorthy™ security model/ thus limiting the views as desired to outside provider
- Saved analytics' can be scheduled as an automated process in the evenings with email reminders to selected participants.
- Custom field dropped into forms will automatically be rendered to the cube for data analysis.
- All features are launched within the CaseWorthy™ application providing seamless access to users.

### **Sungard Interface -**

As is the case with all Software Interfaces, it requires the consent of both providers, to create a functioning interface. CaseWorthy is willing, and capable of creating a Functional Real-Time Interface with the IFAS Accounting Software Package, currently in use at Manatee County. Once permission is granted from IFAS developer, CaseWorthy will work with Sungard to establish the connection.

### **Automated Follow-ups Scheduler –**

The CaseWorthy™ application has a very robust follow-up Scheduling system that can be automated to assure proper follow-up is addressed during the grant application phase. These triggers can be setup to launch automatically during the intake process then dropped in the CaseWorthy™ Calendaring Functionality. In addition to the internal calendaring system follow-ups can be tied to Outlook and Gmail calendars if desired. CaseWorthy™ can then automate the alert process to internal county employees that can drop to a daily work dashboard, Email reminders or phone text messages. The outbound method can be selected by user and is configurable to launch (X) number of days prior to the last follow-up date. This will ensure proper procedures are followed during the grant process or any program that the county has a time sensitive end date.

### **Closing Statement -**

Thank you for your consideration of CaseWorthy, and selecting us as your new software vendor. CaseWorthy's specific offering of a Robust Enterprise Wide solution is the best choice to satisfy all of the Manatee County Community Services Department's needs. As stated above the unique needs of the MCCSD are very specific in nature. The CaseWorthy™ solution will deliver all these requirements with a single software application creating a solution that cannot be offered in the same way, with the same functionality, by any other known vendor at this time.