



CITY OF PROVIDENCE, RHODE ISLAND

**Department: Information Technology**

**RFP Title: CASE MANAGEMENT SOFTWARE - PERA - 3 YEAR CONTRACT WITH 5-1 YEAR  
OPTIONS**

**Opening Date: 11/20/2023**

**Addendum #: 2**

**Issue Date: 11/13/2023**

The purpose of this addendum is to provide answers to questions submitted.



**RFP FOR CASE MANAGEMENT SOFTWARE - PERA - 3 YEAR CONTRACT WITH 5-1 YEAR OPTIONS – Addendum #2**

Questions/Answers::

Q: Which case management systems has the City of Providence and PERA reviewed in the last 3 years?

A: none at this time

Q: Has the system been budgeted? Is the project being funded from capex, opex, or grant funds?

A: Budget is nothing over \$100,000

Q: How many external and internal users will be using the case management system?

A: [IT-RFP-For-Case-Management-Software-Pera-3-Year-Contract-With-5-1-Year-Options-Addendum-1.pdf](#)  
([providenceri.gov](#))

Q: What are the different types of user groups that will use the system such as 1) Intake 2) Case Management Unit 3) Investigators 3) Attorneys - same as 3.

A: Answered on the Addendum - [IT-RFP-For-Case-Management-Software-Pera-3-Year-Contract-With-5-1-Year-Options-Addendum-1.pdf](#) ([providenceri.gov](#))

Q: What is the number of complaints received in the past 3 years (2020, 2021, and 2022)?

A: We don't have a system in place. This is a new system.

Q: What are all the forms and sources of how complaints are received? Is there a % available for each form of complaint intake (phone, fax, email, regular mail)?

A: We want this system to be the any method of intake, preferably online through this system

Q: What business intelligence tools are in use?

A: We using Microsoft 365 ... potentially Power BI

Q: Is there an expected timeline for the project? Vendor selection, contract execution, project kick-off, and go-live?

A: As soon as possible, Q1 of 2024

Q: Does PERA use cloud environments? If yes, is there a preference such as AWS, Azure, or Google?

A: Azure would be perfect but all are ok.

Q: Regarding functional requirements #1 and #3, do public users needs to be able to submit compliments and complaints through an online form that does not require login? Or is PERA okay if the system requires login to submit a compliment/complaint.

A: we would like public users to have the option of submitting anonymously or have the ability to create an account if they choose.



Q: Does PERA have a preference if the automated case updates to constituents are provided by email and/or text?

A: Yes, as long as PERA can control what is release back to the constituent.

Q: Regarding help and support, does PERA want the vendor to provide Tier 1 support to directly to constituents where the vendor provides an 800#, email and/or chat support to constituents directly? If yes, can you estimate the annual volume of support calls?

A: PERA would like Tier 1 for internal users / not externally.

Q: What is the estimated volume for: # of constituent users?

A: Hard to estimate at this time

Q: # of total City users, e.g., PERA staff, investigators, and City IT/support users?

A: Administrators (1-2) - will access only to add/remove users, set-up account/change anything needed. Users (1-15) - We see these as the main users of the site, using daily

Q: # of annual cases

A: Case numbers is an unknown at this point in time. Expectation is less than a hundred in the first year with significant growth expected as users become aware of the service

Q: Do you have a budget for this project that you're allowed to share?

A: No more than \$100,000

Q: For technical requirement #8 language accessibility, it has been our experience that the multi-language requirement only applies to those screens and functions to which a consumer will interact, i.e. a multi-language consumer portal. For the deep administrative functions and system management screens that would only be accessible to PERA staff and system administrators, those screens are not usually translated into all of the languages that are available in the consumer portal. Is PERA comfortable with this approach?

A: Yes, Internal system can all be in English

Q: Is the translation of the application into all the listed languages - Spanish, Chinese, Portuguese, and Cambodian, etc., a mandatory requirement for operation?

A: Yes, Spanish would be the priority.

Q: For the storage of the complaints/compliments in the system, is there a time limit of keeping those digital records?

A: As long as we contract this software product for. With the ability to download/export files should the contract terminate.

Q: Will MFA or other Identity Provider (e.g. Google, Apple, etc) be required for Citizens to login?

A: Would be nice to have all these options.



Q: Can types of documents to be stored possibly be listed/provided (e.g. Standard Operating Procedures, Internal Process Documents, Guides, Training, etc.)?

A: Documents would be any case supporting documents (images, Word, Adobe types, videos)

Q: Would citizens be able to email the system for case creation as well?

A: If that is an option, yes. Didn't consider this when drafting RFP.

Q: What external data analysis tools is Providence looking for integration, could they be provided?

A: At this time, we do not have tools in place to integrate with this system but see a potential for analysis using the Microsoft Suite of tools.

Q: Is the need for 'unlimited' licenses expectation for the external (constituents)?

A: Yes, we don't know how many constituents would use this tool.

Q: How vital is translation support for the Cambodian language, its it a must have?

A: While we are hoping to provide as many languages as our population speaks, it would be ok to not provide all languages.

Q: What would be the expected/estimated volume of cases for constituents, employees?

A: Case numbers is an unknown at this point in time. Expectation is less than a hundred in the first year with significant growth expected as users become aware of the service

Q: For auditing, any time sensitive constraints for data to remain in the system (e.g. 6wk, 6m, 1yr, 7yr, etc)

A: 7 years

Q: Will you have a team to fully support the application after it is implemented, or interested in assisted support from the vendor?



A: We are looking for the vendor to support their product.

Q: Would you like to survey constituents & employees on the service they are being provided on their cases?

A: Nice feature to have but not required.

Q: Can offshore or nearshore resources be leveraged for this project?

A: yes

Q: How many workflows are expected to be in the first Go Live phase? (If possible, could you break it into categories of complexity from 1 – 3 (Simple to Complex)

A: 1-2 workflows (simple to midline)

Q: How many case workers do you have?

A: Internal users will be no more than 20 most likely less than 10 users with only 1 or 2 administrators.

Q: Based on the answers provided and how our Case Management solution can be configured for your organization's unique needs, we'd like to confirm what your anticipated budget is for year one. Is that something you're able to disclose?

A: Not over \$100,000

Q: Page 16 Line item 8a Public portal – citizens would submit cases and have ability to keep track of their case

Our system allows online submission by the public and once submitted the person is supplied with a reference number. Our system does not allow the public to log in and see the progress of the case. Would that be acceptable for the RFP to submit the initial complaint and call into the agency for updates on the case?

A: The answer is maybe. We'd like the submitter to be able to reference the case in the easiest way possible.

Q: Can you provide more details about requirement for document management?

A: Documents would be any case supporting documents (images, Word, Adobe types, videos)



Q: Utilize high level security/encryption. \* Do you have any specific requirements?

A: Looking to see what each proposal suggests.

Q: At least 1 TB of storage for case management. \* No problem. There is an additional cost for Data storage to Salesforce.

A: Please provide costs in your bid.

Q. Offer technical support at least accessible via email with a less than 24-hour response time, with a strong preference for phone call support available during normal City business hours. \*Will there be an additional budget for support? If not, how long would support need to be provided?

A: We are looking for you to include all costs in your bid. Breakout out those additional costs as an add-on fee.

Q. Be automatically backed up by the vendor daily.

\* Additional tools need to be purchased (ie: Ownbackup) or Salesforce offers manual back up by the admin.

A: Breakout out those additional costs as an add-on fee.