

REQUEST FOR PROPOSALS

2027 Client Management Software System

The Atlanta Regional Commission (ARC) and Aging and Independence Services (A&IS) is seeking proposals from firms who have the capabilities to provide Client Management Software System to support our work with programs not funded with state multi-fund grants. This will include the behavioral health coaching/enhanced case management program and fee for service from private payors. As the federally designated Area Agency on Aging (AAA), ARC is responsible for developing long-range plans to accommodate the region's rapidly growing population of older adults, providing and administering services designed to maximize the independence, health, and well-being of older persons, individuals with disabilities, and their care partners.

The Scope of Service for the work is displayed in Exhibit A and provides specific requirements as well as additional services that may be requested throughout the year.

Interested firms should submit a proposal that addresses the types of services outlined in the scope of services in Exhibit A.

Firms must respond to this Request for Proposal (RFP) through ARC Procurement website (<https://procurement.atlantaregional.org/opportunities/>) with applicable word processing formatted documents or PDF file. If you are a first-time contractor/vendor, please create an account by clicking "Register" on the home of the website and complete all criteria.

ARC reserves the right to award this contract based on initial proposals received without formal interviews and to award all or part of this project to one or more firms. Proposals shall not exceed a total of 15 pages (8.5 x 11), inclusive of resumes and firm experience. Covers, end sheets, budget exhibits, and an introductory letter shall not count against this maximum. Font size shall be a minimum of 11 point in all cases. Solution and documentation must align with WCAG 2.1 AA (or applicable standards).

Based on responses to this RFP, ARC may identify a short list of firms from the submissions received. Should it be determined that interviews are required, the shortlisted firms may be invited to participate in an interview process with the evaluation committee. ARC reserves the right to award this contract based on proposals received without interviews.



SELECTION CRITERIA AND PROCESS:

ARC must receive proposals no later than 5:00 p.m. EST on Monday, July 13, 2026, via the ARC Procurement website. All electronic submissions will be time and date stamped in accordance with the ARC mail server. Any proposal submitted after 5:00 pm EST on July 13, 2026, will be considered late and will not be accepted for evaluation. Questions should be submitted via email no later than 5:00 pm EST on June 15, 2026. Please adhere to the following Schedule:

- **RFP Release Date:** Wednesday, June 10, 2026
- **Questions Deadline:** Monday, June 15, 2026 (all questions must be submitted via the solicitation posting on the ARC Procurement website) before 5:00 pm EST
- **Question Responses Posted on ARC Procurement Site:** Thursday, June 18, 2026
- **Proposal Due Date:** Monday, July 13, 2026, before 5:00 pm EST
- **Award Notification:** Wednesday, August 5, 2026

Proposal Format and Submission Instructions

Proposers shall format and submit proposals in the following sections:

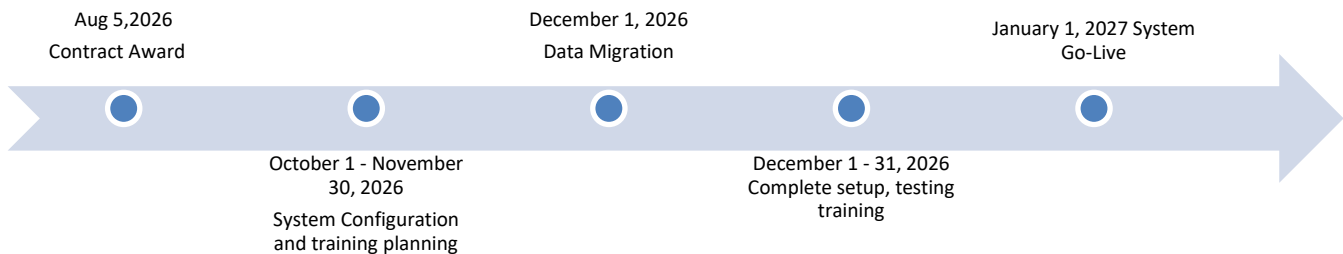
1. **Cover Letter** (including key contact information and signed by an authorized representative)
2. **Executive Summary**
3. **Response to Requirements** (Sections 1–10)
4. **Implementation Plan and Timeline**
5. **Project Staffing and Qualifications**
6. **Security and Compliance Documentation**
7. **Pricing** (including detailed line items and assumptions)
8. **References** (minimum of three)
9. **Appendices** (e.g., sample reports, API documentation, SOC 2 summary, etc.)



The contract will be awarded to the Firm determined to be the most qualified to perform the work based on the following evaluation criteria. Firms should address each following areas thoroughly within submission:

1. **Functional Fit:** Alignment with case management, billing, tracking, docs (25%)
2. **Security Compliance:** RBAC, audit trails, encryption, certifications (20%)
3. **Integrations and Technical Merit:** APIs, interoperability, performance (5%)
4. **Reporting and Analytics:** Standard/ad hoc reports, dashboards, data access (20%)
5. **Implementation Approach, Training, & Support:** Methodology, timeline, migration, testing materials, support tiers, knowledge base (15%)
6. **SLAs & Reliability:** Availability, incident response, reporting (5%)
7. **Vendor Experience & References:** Similar deployments, public-sector experience (5%)
8. **Cost & Value:** Total Cost, transparency, price protections (5%)

ARC intends to award a contract for a one-year initial term with the option to renew for up to four (4) additional terms, contingent upon satisfactory performance and the availability of funding, ARC may issue an optional amendment to extend the contract. System must Go Live by January 1, 2027. A Sample Timeline for a new system is exhibited below:





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TERMS AND CONDITIONS:

- a) ARC reserves the right to select for contract or for negotiations of proposal other than that with the lowest cost, reject all proposals, or to make no award, and to waive minor irregularities in any proposal. ARC reserves the right to request clarification of information submitted and to request additional information from any proposer, and to negotiate any aspect of the proposal with any proposer and negotiate with more than one proposer at the same time.
- b) ARC reserves the right to award any contract to the next most qualified contractor if the successful contractor does not execute a contract within thirty (30) days after the award of the proposal. The contract resulting from acceptance of a proposal by ARC shall be in a form supplied or approved by ARC and shall reflect the specifications in this RFP.
- c) ARC reserves the right to reject any proposed agreement or contract that does not conform to the specifications contained in this RFP, and which is not approved by the client's legal counsel.
- d) ARC will reserve the right to terminate the event upon the occurrence of any circumstance beyond the control of either party, such as acts of God, war, acts of terrorism, government regulations, disaster, strikes, work stoppages, accidents, mandatory quarantines, pandemics, curfews, or other restrictions of movements, or civil disorder, to the extent that such circumstances make it illegal or impossible to continue the event.
- e) Confidential/Proprietary information must be clearly marked; otherwise, submissions may be subject to disclosure per applicable open records laws. Insurance and indemnification requirements will be provided during contracting
- f) ARC shall not be responsible for any costs incurred by the firm in preparing, submitting, or presenting its response to the RFP.

CONFLICT OF INTEREST AND CONFIDENTIALITY

ARC is subject to the Georgia Open Records law. All proposals submitted will become public records to be provided upon request. Any information containing trade secrets or proprietary information, as defined by state law, must be marked as confidential to prevent disclosure. Confidential markings must be limited to the protected information. Entire proposals marked confidential will not be honored. Additionally, conflicts of interest are governed by the ARC Standards of Ethical Conduct available here: [ARC Standards of Ethical Conduct](#). Respondents must disclose any potential conflicts of interest that may arise from the provision of services described herein. Such disclosure should include the name of the individual(s) with whom there is a conflict, any relevant facts to the potential conflict, and a description of the internal controls proposed to mitigate any such conflict. ARC's Staff Legal Counsel will determine whether such disclosure presents a potential organizational conflict of interest that should preclude award to the respondent.

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EXHIBIT A

Work Scope – Client Management Software System

Overview:

ARC/A&IS are requesting interested firms to provide the following features for consideration:

- Provide comprehensive intake, assessments, service planning, approvals, and follow-up workflows.
- Improve data quality, auditability, and compliance with applicable policies and regulations.
- Support accurate and timely billing and financial reconciliation.
- Enable real-time tracking of cases, services, outcomes, and workloads.
- Provide flexible reporting and analytics for management, compliance, and performance improvement.
- Ability to potentially integrate with other software systems
- Provide role-based access.
- Facilitate data migration from legacy systems and ensure full data portability.
- Be device agnostic.
- Be Health Insurance Portability and Accountability Act (HIPAA) compliant.

Interested Firms Shall Deliver:

1. **Software Licensing & Hosting:** Cloud-based (SaaS)
2. **Configuration:** Workflows, forms, roles, and data model as defined by Agency requirements.
3. **Integrations:** Availability to integrate via Application Programming Interface (API) if and when needed.
4. **Data Migration:** Planning, mapping, extraction, transformation, loading, validation, reconciliation.
5. **Testing & Acceptance:** Unit, system, User Acceptance Testing (UAT), performance, security testing; remediation and re-testing.
6. **Training:** Role-based training, materials, and train-the-trainer programs.
7. **Go-Live & Stabilization:** Cutover plan, support, knowledge transfer.
8. **Support & Maintenance:** Ongoing support, upgrades, Service Level Agreements (SLAs) roadmap transparency.
9. **Documentation:** Configuration guides, admin/user manuals, data dictionaries, API specs.

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I. Functional Requirements (Minimum):

Proposers shall confirm and describe how their solution meets or exceeds the following:

1. Case Management Workflows

- Configurable workflows for intake, eligibility, assessment, service planning, approvals, referrals, follow-ups, case closure.
- Ability to define business rules, validations, required fields, and conditional logic.
- Support for case hierarchies, household/group cases, sub-cases, and linked cases.

2. Data Management

- Centralized data repository; field-level customization and metadata; form builder.
- Data validation (format, range, referential integrity) and deduplication.
- Bulk import/export (CSV/Excel), secure ETL (Extract, Transform, Load), and data quality monitoring.

3. Billing and Invoice

- Time capture, units of service, rate schedules, service codes, and payer rules.
- Invoice generation
- Possible integration with financial systems and audit logs.

4. Document Management

- Secure upload/download, versioning, tagging, retention, legal holds.
- Support for e-signatures (e.g., client consent, acknowledgments) and configurable templates.
- Optical Character Recognition (OCR) search within documents (optional).

5. Task & Activity Tracking

- Assign tasks by user/role/team include due dates, reminders, escalations, and SLAs.
- Calendar views, queues, and workload balancing. (optional)

6. Service Tracking & Outcomes

- Track service delivery, units, utilization, milestones, and program outputs.
- Support for outcome measures and longitudinal tracking.

7. Optional (Value-Add) Features

- Workflow Automation (event-driven triggers, notifications, escalations).
- Alerts/Notifications (email/SMS/in-app) to staff and clients (configurable).
- Client Portal for self-service (appointments, document upload, status updates).



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- AI-Assisted Tools (e.g., data validation, duplicate detection) subject to Agency policy.

II. Compliance & Security Requirements:

Proposers shall meet all applicable standards and provide documentation of compliance:

1. Access Controls

- Role-Based Access Control (RBAC) with fine-grained permissions (record, field, function).
- Segregation of duties and least privilege principles.
- Multi-Factor Authentication (MFA) or Azure Single Sign On.

2. Audit & Logging

- Immutable audit trails for data creation, updates, deletions, and access, including user, timestamp, before/after values.
- Log retention time.
- Incident and security incident logs.

3. Data Security

- Encryption in transit (TLS 1.2+) and at rest (AES-256 or equivalent).
- Secure key management and vulnerability management processes.
- Certifications: [SOC 2 Type II / ISO 27001 / HIPAA / CJIS / NIST controls, as applicable].

4. Privacy and Compliance

- Configurable records retention aligned to Agency policy and statutory requirements.
- Consent management and notice of privacy practices.
- Incident response and breach notification procedures.

III. Integration & Technical Requirements:

Application Programming Interface (APIs) and Interoperability: RESTful APIs with documentation, Software Development Kit (SDKs), webhooks; support for pagination, filtering, and rate limits. We do not have current integration needs but would like to evaluate if the selected case management system (CMS) would have the ability to integrate if the need arises in the future.

Performance & Scalability: Define expected response times, concurrency limits, and scalability approach.

Availability: Provide target uptime, disaster recovery: Recovery Point Objective (RPO)/Recovery Time Objective (RTO), backup frequency and retention times.

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IV. Reporting Analytics

Standard Reports: Caseload, service utilization, billing reconciliation, compliance.

Ad Hoc Reporting: User-friendly report builder; filters, pivots, drilldowns; export to Excel/CSV/PDF.

Dashboards: Customizable role-based dashboards with KPIs; real-time or near real-time updates.

Data Access: Secure OData/SQL read-only access or data extracts for the Agency's analytics tools.

V. Implementation Approach

Proposers shall provide a detailed plan including:

1. Timeline & Milestones

- Phases: Discovery, Configuration, Integration, Data Migration, Testing, Training, Go-Live, Stabilization.
- Deliverables and acceptance criteria for each phase.

2. Data Migration

- Inventory, mapping, cleansing, validation, and reconciliation.
- Test migrations and final cutover plan.

3. Testing

- Test plans: functional, performance, security, user acceptance testing (UAT).
- Defect Tracking, remediation, and re-test protocol

VI. Training & Support

- Role-based training (end users, supervisors, admins); training materials and recordings.
- **“Train-the-trainer”** approach for Agency champions.
- Knowledge base, FAQs, how-to guides.
- Support tiers, hours (including time zone considerations), contact methods, escalation paths.

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VII. Service Level Agreements (SLAs)

Proposers shall commit to minimum service levels:

1. *Availability*

- \geq [99.9%] monthly uptime (including third-party failures and excluding scheduled maintenance).

2. *Scheduled Maintenance*

- Minimum notice of 7 days. Maximum frequency of one per month. Maintenance window on weekends or after business hours (Eastern Time).

3. *Incident Response*

- P1 (critical) within 1 hour, P2 (high severity) within 4 hours, P3 (medium severity) within 1 business day.

4. *Resolution Targets*

- P1 (critical) within 8 hours, P2 (high severity) within 2 business days, P3 (medium severity) within 5 business days.

5. *Change Management*

- Notice periods for breaking changes; backward compatibility policies.

6. *Reporting*

- Monthly SLA performance reports and credits for non-compliance, if applicable.

7. *Security Incident Notification*

- Notification within 24 hours of actual or suspected breach.

8. *Disaster Recovery*

- RTO < 4 hours and RPO < 1 hour. Annual DR testing.



VIII. Vendor Qualifications & Experience

- Company background, years in business, financial stability.
- Relevant experience with government/nonprofit case management of similar size/complexity.
- At least three (3) references with contact details.
- Security and compliance attestations (e.g., SOC 2 Type II report summary).
- Product roadmap and release cadence; approach to customer feedback. (optional)

XI. Pricing & Commercial

Licensing Model: User-based, module-based, or enterprise; included features.

Implementation Fees: Discovery, configuration, integrations, data migration, testing, training, project management.

Ongoing Costs: Subscription/support, maintenance, hosting, upgrades.

Optional Add-Ons: Mobile app, client portal, OCR, AI-assisted features.

Travel & Expenses: If applicable; comply with [Agency policy].

Price Protections: Multi-year caps, renewal terms, termination rights

X. Data Ownership, Access, and Portability

- Agency retains full ownership of all data and metadata.
- Proposer shall provide on-demand exports and complete final export upon termination in commonly used formats (e.g., CSV, JSON, database dump) without additional fees beyond reasonable services.
- No vendor lock-in; document data model and provide API specifications.
- Secure deletion and destruction certification after contract termination per Agency policy.