

Tom Green County



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RFP 23-011

Public Defender's Office Case Management Software

6/27/2023

ADDENDUM NO 1:

Notice to Vendors: Clarification Request

1. What is the Public Defender Office's current case management software?

TGC Response: ZLS (Founders Subscription), by Kodify, LLC.

2. Will the County accept electronic proposals instead of physically bound proposals?

TGC Response: Tom Green County currently does not have the ability to accept electronic proposals, all submissions must be in hard copy form, delivered to the TGC Auditor's Office.

3. Prior to the release of this RFP, what are the names of the vendors the County or anyone in the public defender's office spoke with about the needs for a new case management system?

TGC Response: Legal Server, MyCase, ZLS, Clio, and DefenderData.

4. How many 3rd party users - Contract Attorneys, Outside Experts, Investigators, etc. do you work with?

TGC Response: None that have or need access to the CMS.

5. The system we will be proposing prices data migration based on the number of fields [first name, last name, zip code are three example field names] you'd like migrated from the current database. What is the total number of fields with meaningful data that need to be migrated?

TGC Response: The total number of fields (including customized ones) with meaningful data that would need to be migrated is 949. These fields cover everything from client profiles, case notes, organization details, case disposition details, and other specific fields that are necessary for grant-reporting purposes.

6. Do you desire using Office365 Sharepoint to store files, documents, media, etc?

TGC Response: Office365 for email and attachments only. SharePoint is not necessary, as all files must be stored within the system, not through a third party.

7. Where are documents stored today?

TGC Response: The office is paperless, and all digital files are uploaded to our current CMS and stored in the cloud, on AWS.

8. If you need to migrate documents, what is the file size and total number of files to be migrated?

TGC Response: As of today, the number of individual files is 32,305, and these are linked to both cases and people (one to many and many to one). The files have metadata and notes attached. The total file size is 2.71 TB and the file types range from documents to large digital evidence files.

9. What is meant by items in Application Software Specifications, #3, logging. Are these referring to free-form notes, a list of actions completed on a case, or other functionality?

TGC Response: It refers to all of the above – any and all free-form notes that are added to a case (or multiple cases), a list of actions that have been completed on a case (for example, a disposition automatically becomes a note one the case is closed and the disposition information is entered), and the ability to filter through different kinds of logs (notes, court dates, tasks, etc.).

10. Does the current solution include document management?

TGC Response: Yes.

11. Are case documents to be migrated into the new solution? If so, how much data storage is being used for these files? Are these files associated to cases in the current case management system in any way?

TGC Response: Yes, the files are associated with cases (and often multiple files are associated with multiple cases).

12. The RFP indicates a 30-50 staff range. How many should be used for pricing and training purposes?

TGC Response: Currently, it would be at least 30 people, but with each new staff addition, that number would obviously go up. Please use 30 if a “hard number” is required.

13. Is there a desired go-live date?

TGC Response: As soon as possible. The office is already live and has been accepting appointed cases for over a year, with new appointments coming in every day. The data migration and conversion, along with any customization, training, and troubleshooting would need to be expedited. The new office is set to being accepting appointed cases on July 10.

14. With a fully hosted solution with accessibility for the 12 area counties involved, what is the expectation for how many of the counties would have administrative access to make changes to our solution?

TGC Response: One county at maximum.

15. How many total end users will be utilizing the new solution? How many users per office?

TGC Response: Between 30 and 50, depending on staff size – 20-25 per office.

16. What data sources are in scope for the data conversion? Are there any ancillary sources, such as homegrown databases, archived data, excel files, that are in scope?

TGC Response: All data needing to be transferred and converted would live within our current CMS. This includes excel, pdf, Word, photos, audio, and video in a variety of formats

17. How many tables exist in the current case management system database?

TGC Response: This was answered in the first round of questions – nearly 1,000 fields, nearly 3TB of data, etc.

18. Would the County consider a two-week extension of the proposal deadline?

TGC Response: No extension will be issued for this RFP and submission will be due by 2:00 p.m. on Tuesday, July 11, 2023

19. Scope of Services, Pg. 5 – Current staff is listed as 30-50. Please confirm if this range includes any IT staff who will be required to access the proposed solution.

TGC Response: At this point, the office employs no in-house IT staff member.

20. Scope of Services, Pg. 7, Billing Services – Please provide additional information as to what is meant by billing hierarchy.

TGC Response: Please disregard “Billing Hierarchy” there will only be one account, no need for hierarchy billing.

21. Application Software Specifications, Case Creation, (b), Pg. 6 – Please provide additional information as to what is envisioned by pre-loading criminal charges.

TGC Response: The Texas Penal Code has hundreds of offenses under which clients of the public defender’s office are charged. There are also offenses listed in other sources (The Transportation Code, the Health and Safety Code, for example). When a case is created, a client has already been charged with a specific offense, and it is important for the office to know exactly which offense that is (along with the governing statute). Having this data pre-loaded is critical to case creation.

22. Application Software Specifications, Case Creation, (f), Pg. 6 – Please provide additional details on what is envisioned by connecting cases to specific courts. Are any integrations required?

TGC Response: Currently, no technological integrations are required between the public defender office and a specific court, though that could change. Each case that the public defender office handles is assigned to a specific county and a specific court. It is important that that data is tracked within the CMS, not only for grant reporting purposes, but for internal office organization purposes.

23. Application Software Specifications, Storage, (a), Pg. 7 – Please identify the amount of requested storage in the proposed solution.

TGC Response: Unlimited storage - there is no restriction on the amount of data that the PDO can back up and store.

24. Application Software Specifications, Additional Features, (a), Pg. 8 – Are text messages required, or will other forms of interactive communication be accepted?

TGC Response: Text messages are required, as that is one of the preferred methods of communication between the public defender office and their clients.

25. Scope of Work, General – Please identify the organizational structure of the PDO in both the Abilene and San Angelo offices. Please identify all departments/divisions within the PDO, how many attorneys/staff are in each, and identify use cases in the proposed solution for each.

TGC Response: There is a Chief Public Defender that oversees both offices. There is one First Assistant Public Defender in each office who oversees more of the day-to-day operation of each office. The lawyers have assignments in multiple courts and collaborate on teams – there is no hierarchy amongst the teams of lawyers. When fully staffed, under current terms of the grant, each office will have 15 or 16. There is a front-office team that is accountable to the Office Manager. The Office Manager oversees the front-office function of both offices. In San Angelo, that team is composed of three people. In Abilene, it is composed of two. Each office has a Senior Investigator and a more junior investigator. As for the use cases, each team will use all critical functions of the CMS from case creation to case closure – though their internal responsibilities matter, they need to be able to be trained and operational on all aspects of the CMS.

Please include this signed addendum with your response.

Sincerely,



Dustin Klein
Procurement Supervisor

Company

Date

Signature

Please Print Name and Title