

**Request for Information**

**Oregon Office for Community Dispute Resolution**

Mediation Case Management Software Program

**(PCS#** 228000-0004-RFI**)**

**Purpose:** The State Board of Higher Education acting by and through the University of Oregon on behalf of the University of Oregon School of Law, Oregon Office for Community Dispute Resolution (“University”) is issuing this request for information (“RFI”) for the purpose of gathering information about Community Mediation Case Management Software Program. University is issuing this RFI to expand campus knowledge and understanding of the marketplace in preparation for a possible procurement.

**Submittal Instructions:** Please address the listed criteria and respond to the questions set forth in Exhibit A of this RFI. Submit the complete response via email, facsimile or US mail to the Department Contact (noted below) by 5:00 p.m. (Pacific Time) on or before March 21, 2014 (“Closing Date and Time”).

Contact: Carrie Heltzel

Department: School of Law, Oregon Office for Community Dispute Resolution

Address: 1221 University of Oregon, Eugene, OR, 97403-1221

Email: cheltzel@uoregon.edu

**General Information:** This RFI is not a competitive process. Customized quotes, proposals, bids, or pricing must not be provided. Information about goods or services should be general, and pricing should be ballpark pricing, allowing for a threshold analysis by University for a future competitive process (if any). Please feel free to make suggestions, in addition to responding to the criteria and questions set forth in Exhibit A. Information obtained as a result of this request will be used for planning purposes only. Please note that this RFI may or may not lead to a competitive procurement.

This RFI does not constitute a solicitation or an offer of a contract by University. Responses will not bind respondent to University (or University to respondent) contractually or monetarily or in any other way.

Responses to this RFI will be retained by University for a required retention period and made a part of a file or record that will be open to public inspection. If a response contains any information that is considered a “trade secret” under ORS 192.501(2), respondent must mark each page containing such information with the following legend: “TRADE SECRET.”

The Oregon public records law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies “unless the public interest requires disclosure in the particular instance.” Non-disclosure of documents or any portion thereof or information contained therein may depend on official or judicial determinations made pursuant to law. An entire response to this RFI marked as “TRADE SECRET” is unacceptable, and the response will be deemed available for disclosure to the public.

Responses to this RFI will not be returned. University will not provide any comments, documentation or other type of response regarding the results of its review.

EXHIBIT A

Oregon Office for Community Dispute Resolution (OOCDR)

Mediation Case Management Software Program

(PCS# 228000-0004-RFI)

SCOPE OF INQUIRY

**Required Criteria:** Please address the following criteria in your response:

1. Community dispute resolution program management and mediation case activity including:
   1. Referral source, case type, case disposition
   2. Ability to track number of sessions, number of participants, participant demographics
   3. Program activities
   4. Training and education activities
   5. Evaluation activities
   6. Searchable database features; for example, ability to search by participant name, phone number, case number, etc.
2. Reports
   1. Utilization of OOCDR grant report templates and ability to incorporate any changes to templates into software updates
   2. Creation of community dispute resolution center (CDRC) grant reports, including ability to send reminders about pending reports
   3. Ability for OOCDR to aggregate state-wide data from all CDRC reports
3. Mediation Session and Post-Session Surveys
   1. Aggregate individual mediation session and post-session evaluation surveys
   2. Ability for OOCDR to aggregate statewide survey response data
   3. Ability for CDRC’s to tag individual survey results with case number
   4. Ability to monitor and flag time frame of surveys
   5. Ability for CDRC’s to search/query on survey results
4. Marketing/training/outreach/education efforts
   1. Track activities by date, topic, location, and number of participants
   2. Ability to search/query workshops by criteria above
5. Volunteer mediator data
   1. Ability to create/monitor/update individual volunteer mediator profiles – (certifications/trainings/specialization/activities/amount of time contributed, etc.)
   2. Ability to search/query volunteer log for each category mentioned above
6. Fund and Donor development activities
   1. Ability to track/search donor activities and donor amounts
   2. Ability to track fee-for-service activities and amounts
   3. Ability to track grant activities and amounts
7. Mail merge
   1. Ability to auto fill contact information from data base into template forms, letters, etc.
8. Description of software security features and protocols
9. Description of software support features
   1. Provision of software training services to OOCDR and CDRC staff
   2. Description of software support provided
      1. On call technical support/troubleshooting
      2. Online support
      3. In-software help files/tutorials
   3. Provision of software updates, timelines, and procedures
10. Technical support features
    1. Minimum end user system requirements
    2. Confidential storage
    3. Compatibility; export data to/import data from Microsoft Access, Excel, and Word
    4. Software updates
11. User interface
    1. End user modifications to interface
    2. Customize look and feel
    3. Multiple window interface
    4. Demo software for beta testing
12. Software Cost
    1. Description of initial software costs for OOCDR and 17 CDRC’s around the state
    2. Description of monthly fees, if any
    3. Description of total cost