WEST TEXAS OPPORTUNITIES, INC.

REQUEST FOR PROPOSALS

Client Intake, Case Management, Assistance Tracking, and Reporting Software

CSBG | CEAP | WAP

RFP No. 2027 Software Procurement

ISSUANCE DRAFT

ISSUING ORGANIZATION	PROPOSAL DEADLINE
West Texas Opportunities, Inc. 603 N. 4th Street P.O. Box 1308 Lamesa, Texas 79331 www.gowto.org	December 1, 2026 5:00 p.m. Central Time Submit by email to: j.gibson@gowto.org

1. Notice of Request for Proposals

West Texas Opportunities, Inc. ("WTO") invites qualified software vendors to submit proposals for a secure, web-based client intake, case management, assistance tracking, appointment scheduling, reporting, and data-management system supporting WTO's Community Services Block Grant ("CSBG"), Comprehensive Energy Assistance Program ("CEAP"), Weatherization Assistance Program ("WAP"), and related community-service activities. WTO intends to award to the responsible proposer offering the best overall value under the published evaluation criteria.

2. Procurement Schedule

Activity	Date
RFP Issued	October 20, 2026
Written Questions Due	November 19, 2026, 5:00 p.m. Central
Responses to Questions/Addenda Issued	November 23, 2026, anticipated
Proposals Due	December 1, 2026, 5:00 p.m. Central
Intent to Award	December 17, 2026, anticipated
Contract Start	January 1, 2027, anticipated
Production Go-Live	Proposed by contractor and approved by WTO

3. Questions, Interpretations, and Addenda

Questions must be submitted in writing to Jenny Gibson, Executive Director, at j.gibson@gowto.org by the deadline in Section 2. Oral interpretations are not binding. Material clarifications, corrections, or modifications will be issued by written addendum and posted at www.gowto.org or the location identified in the solicitation notice. Proposers must monitor the posting location.

4. Procurement Communications and Quiet Period

From issuance through notice of award, procurement communications must be directed to the designated procurement contact. Proposers must not attempt to influence WTO employees, Board members, evaluators, consultants, or representatives. This does not prohibit authorized questions, WTO-requested demonstrations or negotiations, unrelated contract administration, or protests under WTO procedures.

5. Background and Purpose

WTO is a nonprofit community action agency administering CSBG, CEAP, WAP, and related services. WTO seeks a solution that improves intake, eligibility, case management, assistance tracking, appointments, documents, reporting, data integrity, security, staff efficiency, and management oversight while adapting to future program and reporting changes.

6. Contract Term

The anticipated initial term is January 1, 2027, through December 31, 2027. WTO may, at its sole option and subject to satisfactory performance, need, funding, procurement requirements, and approvals, renew for up to four additional one-year terms. Renewals are not guaranteed. Proposers must provide five-year total cost pricing.

7. Scope of Services

The selected contractor will provide, implement, configure, host as applicable, maintain, support, and secure a client-management solution for WTO programs. Attachment A identifies mandatory and preferred requirements. For every item, the

proposer must identify standard functionality, configuration, custom development, third-party dependency, noncompliance, implementation timing, and additional cost.

8. TDHCA and Program Reporting

The system must support applicable TDHCA requirements, household and program data, CSBG National Performance Indicators, services and outcomes, CEAP assistance and payment information, WAP client/project information, unduplicated reporting, validation, required files, Excel/CSV exports, program-specific and consolidated reports, and ad hoc reporting. The proposer must distinguish standard, configured, and custom reports and explain its process and cost treatment for regulatory changes.

9. Online Appointment Scheduling

The system must provide or integrate appointment scheduling if designated mandatory in Attachment A, including self-scheduling, availability by program/office/staff, confirmation, cancellation, rescheduling, reminders, status, no-shows, mobile access, accessibility, and client-record integration. Related charges must be disclosed.

10. Users and Licensing

WTO anticipates approximately 30 users. The proposal must identify license types, named or concurrent licensing, administrator/read-only/client-portal licensing, added-user costs, minimum commitments, storage, transactions, and growth-related charges.

11. Data Ownership and Permitted Use

WTO owns all client, household, eligibility, case-note, document, assistance, payment, program, report, configuration, audit, and operational data. Contractor use is limited to contract performance. Without written authorization, the contractor may not sell, market with, disclose, monetize, mine, or use confidential/client-level WTO data to train artificial intelligence or machine-learning models.

12. Information Security and Privacy

The proposal must address encryption in transit and at rest, multifactor authentication (MFA), role-based and least-privilege access, audit logging, access review and termination, secure development, vulnerability management, patching, security testing, independent assurance, incident response, and subcontractor safeguards.

13. Hosting, Backup, and Disaster Recovery

The proposer must disclose hosting and backup locations, processing outside the United States, material providers, backup frequency and retention, restoration, continuity, and disaster-recovery procedures.

14. Availability and Service Levels

The proposer must state availability commitments, maintenance exclusions and notice, support hours and channels, severity levels, response and restoration targets, escalation, status communications, account management, and proposed remedies or service credits.

15. Data Migration

The migration plan must address discovery, historical records, clients and households, programs, case notes, assistance/payment history, documents, mapping, crosswalks, deduplication, cleansing, exceptions, test and final migration, reconciliation, cutover, downtime, rollback, and validation. Vendor and WTO responsibilities, limitations, accepted formats, and all costs must be stated.

16. Implementation

The implementation plan must cover kickoff, validation, configuration, security roles, data mapping, test migration, reports, interfaces, user acceptance testing, training, final migration, go-live, stabilization, and acceptance, with named personnel, responsibilities, dependencies, milestones, and WTO effort.

17. Testing and Acceptance

WTO acceptance may require successful mandatory functionality, user testing, migration, record and financial reconciliation, required reports/exports, security configuration, training, documentation, and resolution of critical defects. Payments may be linked to written milestone acceptance.

18. Training

The proposal must identify included administrator and end-user training, live and recorded delivery, materials, sessions, participant limits, refresher and new-hire training, knowledge resources, recording/retention rights, and added-training costs.

19. Accessibility and Usability

The proposed system must be designed to provide accessible and usable services to WTO staff and clients. The proposer must describe applicable WCAG 2.2 Level AA conformance, keyboard navigation, screen-reader compatibility, accessible authentication, mobile-device compatibility, supported browsers, client-portal accessibility, language capabilities, and performance in lower-bandwidth environments. The proposer should provide available accessibility-conformance documentation.

20. Integrations and Interfaces

Identify APIs, single sign-on, email/text notifications, electronic signatures, scanning/upload, accounting exports, utility interfaces, bulk import/export, address validation, reminders, standard versus custom status, and all costs.

21. Subcontractors and Third Parties

Identify material subcontractors and providers, services, access to WTO data, locations, hosting/processing responsibilities, and data storage. The contractor remains responsible and must flow down applicable requirements.

22. Data Export, Termination, and Transition

WTO must receive complete, usable exports during the term and at exit, including agreed data, documents, attachments, configurations, and audit information. The proposal must disclose formats, timing, costs, transition assistance, post-termination access, retention, deletion, and deletion certification.

23. Proposal Format and Required Content

- Executive Summary;
- Company qualifications and comparable experience;
- Completed Attachment A;
- Implementation and data-migration plans;
- Security, privacy, hosting, continuity, and subcontractor responses;
- Training, support, maintenance, and service levels;
- Completed references in Attachment D;
- Completed pricing in Attachment C;
- Clearly identified exceptions to RFP and Attachment F; and
- Completed certifications and disclosures in Attachment E.

24. Proposal Submission

Proposals must be received electronically by email no later than December 1, 2026, at 5:00 p.m. Central Time.

Email proposals to Jenny Gibson, Executive Director, at j.gibson@gowto.org The required subject line is: **2027 Software Procurement RFP – [Proposer Name]**. The complete proposal, including all required attachments, certifications, pricing, and supporting documentation, must be submitted in PDF format. A proposal will be considered received when it is received in the designated WTO email account. Proposers are solely responsible for successful transmission and receipt before the deadline. Proposals received after the deadline may be rejected in accordance with WTO's procurement procedures. If files are too large for one email, the proposer must contact the designated procurement contact before the deadline for instructions and must not use an alternate file-sharing service unless authorized by WTO.

25. Responsiveness Review

WTO may determine a proposal nonresponsive for late submission, missing certifications or pricing, failure to address mandatory requirements, material exceptions preventing performance, or other material noncompliance. WTO may waive minor informalities when fairness is not affected. For a Mandatory requirement, a response of "PC – Partially Complies" must fully explain the limitation, proposed solution, implementation timing, and additional cost. WTO will determine whether partial compliance materially satisfies the requirement or renders the proposal nonresponsive.

26. Evaluation of Proposals

Category	Points
Functional and Program Compliance	30
Implementation and Data Migration	15
Security, Privacy, Availability, and Continuity	15
Qualifications, Experience, and References	10
Support, Training, Maintenance, and Updates	10
Five-Year Total Cost of Ownership	20
TOTAL	100

Scoring Method: Each evaluator will independently score the non-cost categories using the published criteria. Individual evaluator scores for each proposer will be averaged. Cost points will be calculated separately under Section 27. The averaged non-cost score and calculated cost score will be combined to determine the proposer's final evaluation score.

Evaluator Rating Guide: 90–100% of available category points = Exceptional; 80–89% = Very Good; 70–79% = Acceptable; 50–69% = Marginal; 0–49% = Unacceptable. Evaluators must document material strengths, weaknesses, and risks supporting each score.

27. Cost Evaluation

Cost Score = Lowest Evaluated Five-Year Total Cost ÷ Proposer's Evaluated Five-Year Total Cost × 20

WTO may make documented evaluation adjustments solely to compare proposals where required costs are omitted or assumptions conflict with the RFP. An evaluation adjustment does not alter contractual pricing without written agreement.

28. Demonstrations

WTO may invite the highest-ranked responsive proposers to participate in equally structured, scripted demonstrations, if necessary to make a final determination. Demonstrations will be evaluated under the published five-point Demonstration and Usability criterion. They may cover intake/eligibility, CEAP assistance/payment, CSBG case management and NPI reporting, WAP workflow, notes/documents, audit history, TDHCA output, reports, exports, permissions, MFA, and appointments. Invited proposers will be asked to demonstrate substantially the same functions and scenarios.

29. Clarifications and Negotiations

WTO may request clarifications that do not create unfair advantage and may negotiate, consistent with applicable requirements, with the highest-ranked responsible proposer or proposers concerning scope, implementation, terms, service levels, pricing, security, migration, and training. Negotiation does not obligate award.

30. Responsibility Determination

WTO may consider financial capacity, technical capability, staffing, experience, performance, integrity, references, licenses, certifications, compliance, and debarment/suspension status. Required eligibility verification will occur before award.

31. Business Participation

WTO encourages participation by small, minority, women's, veteran-owned, and labor-surplus-area businesses. Applicable certifications and subcontracting participation should be identified. Required affirmative steps apply. Ownership or certification receives no separate points unless an authorized preference is established by addendum.

32. Conflicts of Interest

Proposers must disclose actual, potential, or apparent conflicts involving the proposer, personnel, subcontractors, WTO personnel, Board members, evaluators, or others involved. New conflicts must be promptly disclosed. WTO may require mitigation or disqualification where a conflict cannot be resolved.

33. Reservation of Rights

- Reject any or all proposals;
- Cancel, amend, or reissue the RFP;
- Waive minor informalities;
- Request clarification or documentation;
- Verify information and references;
- Conduct demonstrations or interviews;
- Determine responsiveness and responsibility;
- Negotiate within the published scope;
- Request a best and final offer when permitted;
- Make no award; and
- Award based on best value rather than lowest price.

34. Proposal Protest Procedures

WTO maintains written procedures for administrative resolution of procurement protests. An eligible prospective proposer, proposer, or interested party may protest in accordance with WTO's Procurement Policy and its deadlines. A written protest must identify the procurement, state the specific grounds, include supporting facts and documentation, and state the relief requested. Procedures may be obtained from West Texas Opportunities, Inc., Attn. Jenny Gibson, Executive Director, 603 N. 4th Street, P.O. Box 1308, Lamesa, Texas 79331, Email: j.gibson@gowto.org . Proposers are responsible for all filing requirements and deadlines. This section does not modify or extend any deadline.

35. Proposal Costs and Records

Proposal preparation, presentation, demonstration, clarification, and negotiation costs are the proposer's responsibility. Submitted proposals become WTO records subject to applicable retention and disclosure requirements. Proprietary markings do not override lawful disclosure duties.

36. Insurance

The selected contractor must maintain insurance appropriate to the services and risks, potentially including commercial general liability, workers' compensation, technology errors and omissions, and cyber/privacy liability. Final limits and evidence requirements will be contractual.

37. Required Contract Provisions

The final contract will include applicable remedies, termination, records, audit, debarment/suspension, lobbying, environmental, domestic preference, recovered-material, prohibited-telecommunications, confidentiality, privacy, cybersecurity, data ownership, insurance, indemnification, infringement, warranty, subcontractor, federal, state, TDHCA, and WTO provisions. Threshold-dependent clauses apply only when required.

38. Records, Audit, and Monitoring

The contractor must maintain records supporting performance, charges, subcontractors, security, and compliance for the required period and provide authorized access to WTO and other entitled entities.

39. Regulatory and Program Changes

The proposer must describe monitoring and implementation of CSBG, CEAP, WAP, TDHCA, federal, and other changes, including maintenance-covered changes, custom work, notice, testing, timelines, and charges. Updates necessary to maintain compliance with the contracted CSBG, CEAP, WAP, and TDHCA reporting requirements must be included in annual maintenance unless the change requires a materially new module, interface, or function outside the contracted scope.

ATTACHMENT A – FUNCTIONAL AND TECHNICAL REQUIREMENTS MATRIX

Codes: C Fully Complies | PC Partially Complies | NC Does Not Comply. Delivery: S Standard | CFG Configuration | DEV Custom Development | 3P Third Party.

For a Mandatory requirement, "PC – Partially Complies" must include the limitation, proposed solution, implementation timing, and additional cost. WTO will determine whether partial compliance materially satisfies the requirement.

No.	Requirement	Priority	Comp.	Delivery	Cost	Explanation
1	Secure cloud access	Mandatory				
2	Approximately 30 users	Mandatory				
3	Client/household intake	Mandatory				
4	Household members	Mandatory				
5	Income/eligibility	Mandatory				
6	Document storage	Mandatory				
7	Case notes	Mandatory				
8	CSBG services/outcomes	Mandatory				
9	NPI reporting	Mandatory				
10	CEAP assistance	Mandatory				
11	Voucher/payment tracking	Mandatory				
12	WAP client/project tracking	Mandatory				
13	Current TDHCA output	Mandatory				
14	Program reporting	Mandatory				
15	Consolidated reporting	Mandatory				
16	Excel/CSV export	Mandatory				
17	Multifactor authentication (MFA)	Mandatory				
18	Role-based access	Mandatory				
19	Audit logging	Mandatory				
20	Encryption	Mandatory				
21	Backup/disaster recovery	Mandatory				
22	Migration	Mandatory				
23	User acceptance testing	Mandatory				
24	Training	Mandatory				
25	Technical support	Mandatory				
26	Regulatory updates	Mandatory				
27	Complete data export	Mandatory				
28	Online appointment scheduling	Mandatory				
29	Client portal	Preferred				
30	Email/text reminders	Preferred				
31	API capability	Preferred				
32	Electronic signatures	Preferred				
33	Mobile-responsive access	Preferred				
34	Spanish client interface	Preferred				
35	Ad hoc report builder	Preferred				

ATTACHMENT B – PROPOSAL EVALUATION FORM

Category	Maximum	Score
Functional and Program Compliance	30	
Implementation and Data Migration	15	
Security, Privacy, Availability, and Continuity	15	
Qualifications, Experience, and References	10	
Support, Training, Maintenance, and Updates	10	
Five-Year Total Cost	20	
TOTAL	100	

Strengths:

_____

Weaknesses/Risks:

_____

Evaluator certification: I disclosed conflicts and applied the published criteria independently.

Name: _____

Signature: _____

Date: _____

ATTACHMENT C – FIVE-YEAR PRICING SCHEDULE

Cost Category	Y1	Y2	Y3	Y4	Y5	5-Year Total
Implementation/Project Management						
Configuration						
Data Migration						
Licensing						
Hosting						
Maintenance/Upgrades						
Support						
Training						
Portal/Appointments						
Text/Email						
Interfaces/APIs						
Storage						
Custom Reports						
Travel						
Data Export/Transition						
Other Required Costs						
Discounts						
TOTAL						

Supplemental Pricing and Assumptions

Additional User

$_____ per _____

Additional Storage

$_____ per _____

Professional Services

$_____ per hour

Custom Development

$_____ per hour

Annual Escalation

_____

Optional Modules, Third-Party Charges, and Pricing Assumptions

_____

_____

_____

ATTACHMENT D – REFERENCES

Reference 1

Field	Response
Organization	
Contact / Title	
Phone / Email	
Software / Modules	
Implementation Date	
Comparable Services	

Reference 2

Field	Response
Organization	
Contact / Title	
Phone / Email	
Software / Modules	
Implementation Date	
Comparable Services	

Reference 3

Field	Response
Organization	
Contact / Title	
Phone / Email	
Software / Modules	
Implementation Date	
Comparable Services	

ATTACHMENT E – CERTIFICATIONS AND DISCLOSURES

Certification or Disclosure	Response / Explanation
Authority to submit and bind proposer	☐ Certified
Accuracy of proposal information	☐ Certified
Conflict disclosure	☐ None ☐ Attached
Debarment/suspension certification and exceptions	☐ None ☐ Attached
Required lobbying certification, when applicable	☐ Attached ☐ Not applicable
Subcontractors	☐ None ☐ Identified
Applicable business certifications	☐ None ☐ Attached
RFP exceptions	☐ None ☐ Identified
Acknowledgment of applicable federal, state, TDHCA, and WTO terms	☐ Acknowledged
Material litigation/regulatory proceedings	☐ None ☐ Attached
Addenda received	Nos. _____

Proposer Certification and Signature

By signing below, the authorized representative certifies the responses and disclosures provided in this proposal and its attachments.

Legal Name of Proposer	**Authorized Representative**
Title	**Phone / Email**
Signature	**Date**

ATTACHMENT F – PROPOSED CONTRACT TERMS AND CONDITIONS

These baseline terms are provided for proposal preparation and exception disclosure. They are not an executed agreement and may be revised for the selected proposal, funding requirements, insurance and legal review, and negotiations consistent with the RFP. Proposers must identify all material exceptions.

1. Contract Documents and Precedence

Executed agreement and amendments, then RFP/addenda, then accepted proposal, unless expressly stated otherwise.

2. Term and Renewal

Initial term and optional renewals as stated in the RFP; renewals are not guaranteed.

3. Scope and Performance

The Contractor supplies all required staffing, software, hosting, licenses, configuration, implementation, migration, training, support, maintenance, reporting, security, and documentation.

4. Implementation, Testing, and Acceptance

The plan includes milestones, UAT, migration reconciliation, reporting validation, security approval, training, documentation, defect correction, and written acceptance; payments may be milestone-based.

5. Pricing and Payment

Accepted pricing controls; invoices require detail; undisclosed charges are not payable; payment does not waive nonconformance.

6. Changes

Material changes require a written amendment or authorized change order.

7. Data Ownership and Use

WTO owns WTO data. Contractor use is limited to performance; no sale, monetization, marketing use, unauthorized disclosure, mining, or AI/ML training with confidential/client-level data.

8. Confidentiality and Privacy

Need-to-know access, appropriate safeguards, workforce/subcontractor obligations, and survival after termination.

9. Information Security

Encryption, MFA, role-based access, audit logs, secure development/change management, vulnerability management, patching, access review, and independent assurance where available.

10. Security Incidents

Prompt, contract-defined notice; containment; investigation; evidence preservation; updates; cooperation; remediation; and cost allocation based on cause and law.

11. Hosting, Backup, and Continuity

Disclosed locations/providers, approved processing locations, backups, restoration, tested continuity/DR, RTO, and RPO.

12. Availability and Service Levels

Contractual uptime, maintenance notice, response/restoration targets, escalation, reporting, service credits, and remedies.

13. Regulatory and Reporting Updates

Maintain required CSBG, CEAP, WAP, TDHCA, and agreed reporting. Updates necessary to maintain compliance with the contracted reporting requirements are included in annual maintenance unless a change requires a materially new module, interface, or function outside the contracted scope.

14. Accessibility
Maintain agreed accessibility, including applicable WCAG 2.2 AA commitments, disclose limitations, and remediate reasonably.

15. Subcontractors
Disclose material providers; contractor remains responsible; flow down obligations; material changes may require approval.

16. Records and Audit
Maintain performance, charge, security, subcontractor, and compliance records and provide authorized audit access.

17. Warranties
Authority, professional performance, material conformity, no introduced malicious code, and noninfringement warranty subject to final negotiation.

18. Intellectual Property
Each party retains preexisting IP; WTO owns data; final agreement defines rights in configurations, reports, interfaces, and custom development.

19. Indemnification
Final contract may address third-party claims from negligence, misconduct, injuries/damage, infringement, confidentiality/data breaches, and legal violations, subject to legal review.

20. Insurance
Appropriate general liability, workers' compensation, technology E&O, and cyber/privacy coverage at final limits.

21. Limitation of Liability
Subject to legal review; exclusions may apply for security/confidentiality, infringement, indemnification, fraud, gross negligence, and willful misconduct.

22. Compliance and Federal Terms
Applicable law, TDHCA/funding requirements, WTO provisions, and threshold-dependent federal clauses.

23. Debarment and Eligibility
Maintain eligibility and promptly disclose exclusion actions; WTO may verify during the term.

24. Assignment and Change of Control
No material assignment without consent; advance notice of changes affecting performance, data, security, or support.

25. Termination for Cause
Cure rights and immediate remedies for serious security, confidentiality, eligibility, insolvency, or legal-compliance events as finalized.

26. Termination for Convenience
WTO may terminate on notice; allowable accepted work through termination is payable; contractor must mitigate and transition.

27. Exit, Data Return, and Deletion
Complete usable exports, transition assistance at disclosed rates, continued access during transition, secure deletion, and certification.

28. Disputes, Law, and Venue
Good-faith escalation before litigation where appropriate; final law, venue, immunity, and mediation terms require legal review.

29. Independent Contractor

No employment, partnership, joint venture, or agency relationship.

30. Publicity

No use of WTO name, marks, client information, contract, or logo without written consent unless legally required.

31. Notices

Formal notices use final contract methods; operational communications do not amend the agreement.

32. Survival and Entire Agreement

Data, confidentiality, security, audit, IP, indemnity, payment, and exit obligations survive as appropriate; amendments must be written.

Proposer Exceptions to Attachment F

List each requested exception or revision. Silence may be treated as acceptance, subject to the final negotiated contract.

Term	Requested Exception/Revision	Reason	Alternative Language