Cover Page

The cover page itself may not be deleted, but design and content are entirely at Respondent’s discretion. All existing content may be deleted.

HMIS Proposal Template

Murfreesboro/Rutherford County

Please see RFP Section III Proposal Content & Submission for instructions.

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# Cover Letter

One-page cover letter. The header and these instructions should be deleted.

# 1 Respondent Information

## 1.1 Business

|  |  |
| --- | --- |
| Full legal name  |  |
| Mailing address – Line 1 |  |
| Mailing address – Line 2 |  |
| Mailing address - City, State, ZIP |  |
| Main phone number |  |
| Time zone | Select time zone. |

## 1.2 Proposal Point of Contact

Identify the primary point of contact for questions about the proposal and/or notifications regarding the proposal process.

|  |  |
| --- | --- |
| Name  |  |
| Title |  |
| Email Address |  |
| Phone Number |  |

## 1.3 Authorized Representative

Provide name and contact information for a representative of the business who has the authority to enter into contracts and sign legal documents on behalf of the Respondent.

|  |  |
| --- | --- |
| Name  |  |
| Title |  |
| Email Address |  |
| Phone Number |  |

# 2 Certifications and Acknowledgements

On behalf of Full legal name of business (“Respondent”), I/we certify that:

1. Submission of a proposal constitutes acknowledgement and acceptance of all terms and conditions defined in the RFP, except as exceptions or reservations specified by Respondent in this document.
2. All persons involved in the preparation of this proposal are aware of the requirements established by these certifications and assurances and agree to comply.
3. All information provided is accurate as of the submission date. Respondent will notify the RFP coordinator (HMISRFP@h3arc.org) of any change or anticipated change that might impact the accuracy of any part of this proposal. Misrepresentations will disqualify Respondent from consideration.
4. Any costs incurred by Respondent associated with proposal preparation and/or participation in the evaluation process are solely the responsibility of the Respondent, regardless of the outcome. Proposals and associated materials become the property of the CoC and will not be returned.
5. Respondent will not try to convince any other HMIS vendor to submit or decline to submit a response to this RFP and has not coordinated proposed costs with any other potential Respondent.
6. Respondent will not engage in behavior, conversation, or communication that might reasonably be perceived as an attempt to influence the outcome of the evaluation process (other than by participation in the process itself). Respondent will not discuss the RFP process with members of the CoC,, the evaluation team, or any H3ARC employee until the final selection is announced.
7. If any member of the CoC, the evaluation team, or any H3ARC employee suggests directly, indirectly, explicitly, or implicitly that s/he might be able to influence the evaluation process in Respondent’s favor for any reason, Respondent will notify RFP Coordinator (HMISRFP@h3arc.org)
8. Respondent agrees that the CoC may contact references, funders, and/or other sources of information regarding compliance; customer experience; organizational, technical, and fiscal capacity; and other factors pertinent to assessing Respondent’s ability to meet the CoC’s HMIS needs.
9. Respondent is eligible to enter into a contract for the provision of software as a service in the State of Tennessee and Federal government and is willing to provide relevant documentation, including articles of incorporation, business licenses, taxpayer identification number(s), etc., upon request.
10. This proposal is a firm and fixed offer of existing software functionality, licensing, and standard services for the listed costs, subject to conditions listed in the proposal, valid for at least 120 days from the submission date of this proposal for a contract term of at least two years.
11. Costs identified for programming, data mapping and migration, and any other work contingent on detailed specifications are estimates and subject to revision and/or negotiation.
12. Costs proposed in this document will be scored against other proposals and should represent Respondent’s best offer.
13. The CoC reserves the right to negotiate services and costs with Respondent, to include the addition or removal of listed requirements and/or software customization to better meet CoC or HUD requirements.

1. Respondent understands that proposals may be subject to review by the public and has clearly identified all confidential and/or trade secret content as required in section *IV. Proposal Content & Process* of the RFP. Unless required by law or court order, the CoC will not release these confidential portions of the proposal.
2. Respondent may withdraw proposals from consideration at any point in the process as described in section IV *Proposal Content & Process* of the RFP.
3. The CoC may issue an addendum, revise, or withdraw this RFP without prior notice.
4. The evaluation process defined in the RFP is contingent on receiving at least three proposals that meet evaluation criteria. If this does not happen, the CoC may revise the process or evaluation criteria to expand the eligible pool of Respondents, issue another RFP, proceed with fewer than three candidates, or otherwise ensure that the CoC’s HMIS needs are satisfied.
5. Respondent will authorize the CoC to request a credit report for consideration in the final phase of evaluation.
6. The CoC may request additional information at any point in the evaluation process to confirm or clarify proposal content.
7. Respondent will follow applicable civil rights laws and Executive Orders. There must be no outstanding findings of noncompliance with civil rights statutes, Executive Orders, or regulations, unresolved secretarial charge of discrimination issued under the Fair Housing Act, no adjudications of civil rights violations on a civil action or deferral of processing of proposals from the vendor imposed by HUD.
8. Respondent certifies that no employee, member of its executive management, key staff, or any board member has been convicted of a criminal offense related to the administration of funds, is ineligible to enter into a federally-funded contract or is involved in any litigation or other legal matter that might compromise Respondent’s organizational capacity as represented in this proposal.
9. The CoC may elect to award all or a portion of the scope of work defined by the RFP and/or may elect to split the award between two Respondents, which would require Respondent to collaborate with another organization to provide some or all services. Respondent may decline to agree to this arrangement and withdraw.
10. The Evaluation Panel may waive minor technical deficiencies or any informality in a submitted proposal.
11. If the CoC and selected Respondent are unable to come to satisfactory agreement about the terms of a contract, the CoC will re-visit the evaluation process (see #17). The selected Respondent will be ineligible for further consideration.
12. This Request for Proposals for a Homeless Management Information System is issued in accordance with 2 CFR part 200; any resultant contract must comply with same.

**Disclosures and Exceptions to Certifications and Acknowledgements**

Click or tap here to enter text.

**Signatures**

|  |  |  |
| --- | --- | --- |
| Authorized Representative |  |  |
|  |  | Click or tap to enter a date. |
| Name and title of authorized representative |  | Date |
| Proposal Point of Contact |  |  |
|  |  | Click or tap to enter a date. |
| Name and title of point of contact |  | Date |

# 3 Requirements Assessment

The word “requirement” is used to refer to functionality, system features, administration features, system performance, reporting, support, and training. etc.

The listed requirements in this assessment section include a “Yes/No/Other” drop-down list with section for supporting narrative.

* Answer “Yes, standard” if the requirement is available, currently in use, and included in the basic cost of licensing the HMIS software. Use the *Additional information/description* section to describe how the software / service meets the requirement.
* Answer “Yes, add-on” if the requirement is met by existing functionality currently available at an extra cost. Use the *Additional information/description* section to describe how the software / service meets the requirement. These must also be listed in the *Summary of Costs* section.
* Answer “Other (explain)” if the requirement is currently under development, available from a third-party, or if a currently available alternative might serve the same purpose. Use the *Additional information/description* section to explain and elaborate.
	+ Include an implementation date for functionality currently being developed.
	+ Any of these with an associated cost must be listed in the *Summary of Costs* section.
* Answer “No” for all other circumstances. If custom development to make the requirement available is feasible, provide a brief note to that effect and list the requirement in the *Summary of Costs* section with a (non-binding) estimate of time and cost.

For each requirement, provide a narrative response that describes how the proposed solution meets the need. Narratives should be clear, concise, and directly relevant to listed requirements. The use of screenshots or other graphics to illustrate narrative in the *Additional information/description* sections is welcome. No graphic should include Respondent or Software names.

There is no need to repeat identical content for multiple services. If a single feature satisfies multiple services, include the narrative response for the first listed service. For each subsequent service, reference the service number (e.g., “See service 3.1”).

##

## 3.1 Hosting (2 points)

|  |  |
| --- | --- |
| ***1. Respondent hosting of application and database(s) is available*** | Select one. |
| If available, describe server specifications, security measures to isolate data from any other instances of the application/database hosted on the same server, and any access or responsibility associated with the server or hosting for HMIS Lead. |
| ***2. Provide technical safeguards to ensure highest level of client confidentiality, data encryption and authentication, role-based security, audit trail, event monitoring, restrict user level access when appropriate, flexible data sharing while ensuring client data privacy and confidentiality (Compliance with HIPPA, 42 CFR, client consent, ROI, etc.)*** | Select one. |
| Additional information/description. |

Describe/list the network requirements for running/operating system.

## 3.2 Comparable Database (3 points)

Describe options for a second instance of the application for use by victim services providers.

##

## 3.3 Training and Technical Support (8 points)

|  |  |
| --- | --- |
| ***1. Respondent provides training for system administrators*** | Select one. |
| Additional information/description. |
| ***2. Respondent offers train-the-trainer (admin) instruction***  | Select one. |
| Additional information/description. |
| ***3. Respondent provides technical support for system administrators and has a system in place to track and respond to questions, bug reports, etc. with ability for HMIS Lead to see/monitor status and progress.*** | Select one. |
| Additional information/description, including hours and response times. |
| ***4. Respondent has an available library of training materials for use in training end users (e.g., comprehensive manuals, online training, etc.) HMIS Lead training staff can select what the end-user has access to (based on roles).*** | Select one. |
| Additional information/description. |
| ***5. A training and demonstration site is available.***  | Select one. |
| Additional information/description. |
| ***6. User Acceptance Test (UAT) procedures and test environment for every upgrade, enhancement, and other system changes.***  | Select one. |
| Additional information/description. |
| ***7. Ability to receive feedback via user forums/feedback options within the system.*** | Select one. |
| Additional information/description. |

## 3.4 System Availability and Maintenance (5 points)

|  |  |
| --- | --- |
| ***1. Software is web-based, compatible with current browsers, and maintains some backward-compatibility (list browsers).*** | Select one. |
| Additional information/description. |
| ***2. User interface is available 24/7 other than planned outages.*** | Select one. |
| Additional information/description. |
| ***3. Planned outages for system maintenance or deployment of updates are coordinated with HMIS Lead at least 3 business days in advance and scheduled for periods of low usage, overnight (or HMIS Lead is responsible for system maintenance and can install updates).*** | Select one. |
| Additional information/description. |
| ***4. HMIS Lead is notified of any unplanned outages and the status of identifying/resolving within 60 minutes.*** | Select one. |
| Additional information/description. |
| ***5. Any planned updates or modifications to any aspect of the user experience, report logic, and/or software functionality are documented; documentation is provided to the HMIS Lead in advance of development.*** | Select one. |
| Additional information/description. |
| ***6. Any deployment of critical bug fixes is documented; notification and documentation are provided to HMIS Lead within 24 hours.*** | Select one. |
| Additional information/description. |

## 3.5 Security and Privacy (12 points)

|  |  |
| --- | --- |
| ***1. Software employs industry-standard or better security protocols, including support for two-factor or multi-factor authentication.*** | Select one. |
| Additional information/description |
| ***2. PII (personally identifiable information) is encrypted for storage and cannot be browsed in database tables.*** | Select one. |
| Additional information/description. |
| ***3. HMIS Lead can assign user roles (e.g., system administrator, data entry, reports only) that define permissions and access to information.*** | Select one. |
| Additional information/description. |
| ***4. Data-sharing configuration allows HMIS Lead to create project groups and field-level control of sharing.*** | Select one. |
| Additional information/description. |
| ***5. Client data-sharing is restricted for clients who decline to consent.*** | Select one. |
| Additional information/description. |
| ***6. HMIS Lead can create/activate/deactivate users, define and edit project associations and associated user roles for each, and update contact/other information in real-time (as opposed to batch/next day).*** | Select one. |
| Additional information/description. |
| ***7. Audit logs keep a history of changes made to records (describe user/HMIS Lead access to data).*** | Select one. |
| Additional information/description. |
| ***8. All contact with client, project, and system data in both the user interface and via database tables is logged (describe HMIS Lead access to logs).*** | Select one. |
| Additional information/description. |
| ***9. Passwords have complexity / length requirements and must be reset regularly.*** | Select one. |
| Additional information/description. |
| ***10. Users can reset their own passwords.*** | Select one. |
| Additional information/description. |
| ***11. HMIS Lead can track training dates for individual users in HMIS and receives alerts and/or can generate a report of users requiring recertification.*** | Select one. |
| Additional information/description. |
| ***12. Users are automatically logged out after a period of inactivity.*** | Select one. |
| Additional information/description. |
| ***13. User access to records is limited by project associations.*** | Select one. |
| Additional information/description. |
| ***14. Users are required to log in to a project and the ability to add/edit records is limited to projects currently active within the CoC.*** | Select one. |
| Additional information/description. |
| ***15. User ability to run reports is limited by user level specification.*** | Select one. |
| Additional information/description. |

##

## 3.6 Data Collection (8 points)

|  |  |
| --- | --- |
| ***1. Vendor-configured collection of all standard HMIS data elements as defined in the HMIS Data Dictionary.*** | Select one. |
| Additional information/description. |
| ***2. HMIS Lead can create custom forms and fields on standard and custom forms systemwide or for individual projects or programs.*** | Select one. |
| Additional information/description. |
| ***3. Software includes scan card, biometric, or similar functionality for bed nights, services, etc.*** | Select one. |
| Additional information/description. |
| ***4. Software has data entry wizards/workflows that guide users through all required data collection for project entry/annual assessment/exit.*** | Select one. |
| Additional information/description. |
| ***5. Software stops users from choosing/creating/deleting data that is inconsistent with HUD rules and/or data already present.***  | Select one. |
| Additional information/description. |

## 3.7 System Features (15 points)

|  |  |
| --- | --- |
| ***1. Ability to record and track referral data (type, status, follow-up).*** | Select one. |
| Additional information/description. |
| ***2. Mobile response experience that can leverage device features including geolocation, camera features, and touchscreen.*** | Select one. |
| Additional information/description. |
| ***3. Document and file upload capability at the program, client, agency, and system level.*** | Select one. |
| Additional information/description. |
| ***4. Ability to create and modify client assessment forms with weighted & auto scoring.*** | Select one. |
| Additional information/description. |
| ***5. Ability to match homeless clients and appropriate housing and service resources based upon assessment responses and housing eligibility requirements.*** | Select one. |
| Additional information/description. |
| ***6. Ability to identify eligibility at the client and project level.*** | Select one. |
| Additional information/description. |
| ***7. Ability to track real-time reservations, occupancy, and availability of beds and units.***  | Select one. |
| Additional information/description. |
| ***8. Prioritization of clients on Master List – by name, list, etc.***  | Select one. |
| Additional information/description. |
| ***9. Safeguards to prevent the creation of duplicate records and built-in duplicate management/merge tool.*** | Select one. |
| Additional information/description. |
| ***10. Auto exit and default end-date functionality.*** | Select one. |
| Additional information/description. |
| ***11. System alerts for annual assessment updates and ROI expiration.***  | Select one. |
| Additional information/description. |
| ***12. Automatic update of eligibility which is attached to age, veteran status and other elements that change over time.***  | Select one. |
| Additional information/description. |
| ***13. Ability to create anonymous client records for the integration of domestic violence, youth, and/or HIV/AIDS programs into the Coordinated Entry System.*** | Select one. |
| Additional information/description. |
| ***14. Client intake and update of program enrollments that records historical changes made to each field and indicates last time intake was updated.*** | Select one. |
| Additional information/description. |
| ***15. Client intake ability to track benefit eligibility and participation.*** | Select one. |
| Additional information/description. |
| ***16. Ability to confirm user actions through pop-up questions (e.g. “are you sure you want to delete this record?”)*** | Select one. |
| Additional information/description. |
| ***17. Ability to communicate via notifications, alerts, messages and reminders at the system, organization, program, client, and user- level.*** | Select one. |
| Additional information/description. |
| ***18. Assessments/history of services provided.*** | Select one. |
| Additional information/description. |
| ***19. Ability to add multiple program entry/exit history.*** | Select one. |
| Additional information/description. |
| ***20. Ability to have one program with users from multiple agencies.*** | Select one. |
| Additional information/description. |
| ***21. Ability to utilize electronic signatures.*** | Select one. |
| Additional information/description. |
| ***22. Ability to record multiple services at the same time.***  | Select one. |
| Additional information/description. |
| ***23. Streamlined printing of individual client records.***  | Select one. |
| Additional information/description. |
| ***24. Batch data functionality.*** | Select one. |
| Additional information/description. |

## 3.8 Usability / Other Features (4 points)

|  |  |
| --- | --- |
| ***1. Software includes a client messaging feature, i.e., users can enter messages/notes that can be passed on to the client by the next user to see the client.*** | Select one. |
| Additional information/description. |
| ***2. Software includes a user messaging feature, i.e. HMIS Lead/Program Manager, etc. (specific user assignment) can enter messages/notifications to users that will be displayed at the next login.*** | Select one. |
| Additional information/description. |
| ***3. Users can upload photos, scans, and other documents to a client record (master and/or program and/or agency level)*** | Select one. |
| Additional information/description. |
| ***4. Bed and unit availability is tracked in real time using a combination of project inventory and enrollment data; information is available to relevant users, possibly as a reservation system for dates in the future.*** | Select one. |
| Additional information/description. |
|  |

##

## 3.9 Data Quality Tools (10 points)

|  |  |
| --- | --- |
| ***1. HMIS Lead can set data collection for standard and custom fields to mandatory or optional*** | Select one. |
| Additional information/description. |
| ***2. HMIS Lead can create validation/regular expressions for standard and custom fields and configure error messages for display, if desired.***  | Select one. |
| Additional information/description. |
| ***3. Software requires database search prior to creation of a client record and has other prevention measures for duplicate client records*** | Select one. |
| Additional information/description. |
| ***4. Software prevents creation of overlapping enrollments in the same project for the same client and same residential type*** | Select one. |
| Additional information/description. |
| ***5. Software enforces the requirement for one and only one head of household per enrollment and handles changes as a head of household leaves the system.*** | Select one. |
| Additional information/description. |
| ***6. Users see reminders of missing/don’t know/refused responses including missing annual assessments for active clients at login*** | Select one. |
| Additional information/description. |
| ***7. HMIS Lead has access to reports and/or receives alerts about potential duplicate client records***  | Select one. |
| Additional information/description. |
| ***8. HMIS Lead can merge duplicate client records*** | Select one. |
| Additional information/description. |
| ***9. Users and HMIS Lead have access to data quality reports that identify missing/don’t know/refused responses on HMIS fields for all records in a given date range.*** | Select one. |
| Additional information/description. |
| ***10. Software prevents and/or has tools to identify logically inconsistent data (income sources identified for clients with no income, entry date after current date, etc.).*** | Select one. |
| Additional information/description. |
| ***11. Software alerts users to upcoming annual assessment deadlines for active clients.*** | Select one. |
| Additional information/description. |
| ***12. Auto-exit functionality for projects, after a time designated by HMIS Lead, based on project’s specifications (according to HUD standards).*** | Select one. |
| Additional information/description. |

##

## 3.10 Coordinated Entry (8 points)

|  |  |
| --- | --- |
| ***1. Support for all current versions of VI-SPDAT or comparable assessment as determined by the CoC.*** | Select one. |
| Additional information/description. |
| ***2. Support for a transactional history of VI-SPDAT (or comparable) assessments.*** | Select one. |
| Additional information/description. |
| ***3. VI-SPDAT (or comparable) assessments and scores are an integral part of a client record accessible in any login context to all users with permission to view a given client record.*** | Select one. |
| Additional information/description. |
| ***4. Integrated real-time housing/bed inventory and referral system that allows coordination between central phone bank and residential/shelter projects.*** | Select one. |
| Additional information/description. |
| ***5. Tracking and user alerts for status changes, no-shows, etc.*** | Select one. |
| Additional information/description. |
| ***6. Includes a prioritization tool that allows prioritization of individual clients in each eligible category (youth, individual, family) and incorporates data from other enrollments (status changes) and custom fields.*** | Select one. |
| Additional information/description. |
| ***7. Other Coordinated Entry features / functionality.*** |
| Additional information/description. |

## 3.11 Reporting (15 points)

|  |  |
| --- | --- |
| ***1. CoC Annual Performance Report***  | Select one. |
| Additional information/description. |  |
| ***2. ESG CAPER*** | Select one. |
| Additional information/description. |  |
| ***3. HUD Longitudinal System Analysis*** | Select one. |
| Additional information/description. |  |
| ***4. HUD System Performance Measures***  | Select one. |
| Additional information/description. |  |
| ***5. PATH Annual Report***  | Select one. |
| Additional information/description. |  |
| ***6. HMIS CSV Export / VA Repository generated by regular user*** | Select one. |
| Additional information/description. |  |
| ***7. HMIS CSV Export / RHY Repository generated by regular user*** | Select one. |
| Additional information/description. |  |
| ***8. All federal reports pull data from HMIS data elements consistent with published specifications and are updated on schedule.*** | Select one. |
| Additional information/description. |  |
| ***9. By-Name List for Veterans and Chronic Homeless Individuals***  | Select one. |
| Additional information/description. |  |
| ***10. HUD Housing Inventory Count (or similar) report*** | Select one. |
| Additional information/description. |
| ***11. HUD Point-In-Time Count (or similar) report***  | Select one. |
| Additional information/description. |
| ***12. HMIS Lead (and those designated by HMIS Lead) can develop custom reports based on standard and custom fields and assign them to projects.*** | Select one. |
| Additional information/description. |
| ***13. Reporting includes drill-down/detailed view of included clients and links to client records.***  | Select one. |
| Additional information/description. |
| ***14. Report results are exportable to Word/Excel/CSV/PDF/other.*** | Select one. |
| Additional information/description. |
| ***15. Users can schedule automated report generation with emailed results.*** | Select one. |
| Additional information/description. |
| ***16. HMIS Lead can assign canned reports to any project that collects the data required to produce them, regardless of funding source or project type.*** | Select one. |
| Additional information/description. |
| ***17. Reporting includes configurable parameters so that results may be filtered by standard (e.g., Veteran Status) or custom fields.*** | Select one. |
| Additional information/description, including standard report parameters for canned reports, if any. |
| ***18. For projects with multiple funding sources, enrollments / services / bed nights can be associated with one or more specific grants; report output can be filtered by grant and aggregated across multiple projects with the same grant ID*** | Select one. |
| Additional information/description. |
| ***19. Advanced analytics tools that allow for the inclusion of external data are available (Application Program Interface API).*** | Select one. |
| Additional information/description. |
| ***20. Ability to separate reporting by contract for multi-funded projects.*** | Select one. |
| Additional information/description. |
| ***21. Ad hoc reporting functionality that allows users to generate real-time reports at client, program, agency, and system levels.*** | Select one. |
| Additional information/description. |
| ***22. Ad hoc reporting functionality that allows users to generate near real-time reports about CES intake data, housing navigation assignment, housing match and housing placement.*** | Select one. |
| Additional information/description. |
| ***23. Ability for HMIS Lead to run reports of duplicate entries based on chosen fields and options of “exact” or “similar” entries.*** | Select one. |
| Additional information/description. |
| ***24. Protocols for handling report requests that are too burdensome to generate through the user interface (e.g. reports for very high-volume programs, CoC System Performance Measures Reports, Program Level Performance Measure Reports).*** | Select one. |
| Additional information/description, including standard report parameters for canned reports, if any. |
| ***25. Data visualization tools and/or simple integration with third-party data visualization systems to maximize the visibility of key performance indicators.***  | Select one. |
| Additional information/description. |
| ***26. Thorough and continually updated report documentation (including data models and data dictionaries) for standard reports that shows data sources from the database and describes the purpose and uses of the report.***  | Select one. |
| Additional information/description. |

## 3.12 Data Integration, Exchange, and Access (10 points)

|  |  |
| --- | --- |
| ***1. All HMIS data elements exportable to current HMIS CSV in a single dataset including multiple projects/project types/funders.*** | Select one. |
| Additional information/description. |
| ***2. All HMIS data elements exportable to current HMIS XML in a single dataset including multiple projects/project types/funders.*** | Select one. |
| Additional information/description. |
| ***3. HMIS Lead can import all HMIS data elements from a standard HMIS (CSV and/or XML) dataset including multiple projects/project types/funders.*** | Select one. |
| Additional information/description. |
| ***4. HMIS Lead can configure a custom export of HMIS and other data.*** | Select one. |
| Additional information/description. |
| ***5. HMIS Lead can map and import HMIS and other data not in standard HMIS CSV/XML format.*** | Select one. |
| Additional information/description. |
| ***6. HMIS Lead has direct database access to real-time HMIS data for reporting and data analysis purposes (live or reporting copy).*** | Select one. |
| Additional information/description. |
| ***7. The system can integrate legacy photos and other documents and file types.*** | Select one. |
| Additional information/description. |
| ***8. Database relationships and dependencies are fully documented for extraction and reporting purposes.*** | Select one. |
| Additional information/description. |
|

|  |  |
| --- | --- |
| ***9. HMIS system can import from other systems (not on HMIS) and identify and merge same/duplicate clients even for those with anonymous specific data.*** | Select one. |
| Additional information/description. |

 |
| ***10. HMIS system can export from other systems (not on HMIS).*** | Select one. |
| Additional information/description. |

## 3.13 Local Administrator Functions (5 points)

|  |  |
| --- | --- |
| ***1. Ability to map multiple funder contracts to programs and to track performance outcomes separately.***  | Select one. |
| Additional information/description. |
| ***2. Program, performance target, and contract configuration capability.*** | Select one. |
| Additional information/description. |
| ***3. Data merge/de-duplication capability.*** | Select one. |
| Additional information/description. |
| ***4. Allow for flexible multi-funding project and service customization.*** | Select one. |
| Additional information/description. |
| ***5. Open/Close functionality for client and program records.***  | Select one. |
| Additional information/description. |
| ***6. User management for account(s) access and password as defined by HMIS Lead assigned abilities.***  | Select one. |
| Additional information/description. |
| ***7. Ability to partition the view/access of data by user, program, and organization***  | Select one. |
| Additional information/description. |
| ***8. Ability to create and manage custom rules for data elements collected, including the ability to hide or mask individual project-specific client data elements.*** | Select one. |
| Additional information/description. |
| ***9. Ability to create and manage custom forms, workflows, and assessments, and re-order data fields and pages.*** | Select one. |
| Additional information/description. |
| ***10. Ability to access a live data warehouse that includes all tables and views that can be queried on demand.***  | Select one. |
| Additional information/description. |
| ***11. Ability to communicate via notifications, alerts, messages and reminders at the system, organization, program, client, and user-levels.*** | Select one. |
| Additional information/description. |
| ***12. Ability to configure/customize user page and data field views.*** | Select one. |
| Additional information/description. |

## 3.14 Installation and Customization (5 points)

|  |  |
| --- | --- |
| ***1. Comprehensive conversion strategy from the existing system including outlining estimated time needed for conversion and verification of data accuracy.***  | Select one. |
| Additional information/description. |
| ***2. Coordinate activities related to the implementation and installation of the HMIS.*** | Select one. |
| Additional information/description. |
| ***3. Process for receiving customer product enhancement requests to drive future software development.***  | Select one. |
| Additional information/description. |
| ***4. Protocol for receiving, reviewing, and responding to both automated and requested software fixes based upon service level agreements.*** | Select one. |
| Additional information/description. |

# 4 Organizational Capacity

## 4.1 Overview

Describe the organization’s experience in providing software, service, and support, particularly as it applies to HMIS. This experience needs to be associated with the HMIS version that is being proposed.

Information of particular interest includes:

* Customer base in general (number of customers/number of years) and the relative portion of business related to HMIS;
* Business model (i.e., non-profit, for profit, governmental entity, etc.);
* HMIS organizational structure and staffing with names;
* Fiscal capacity to complete work; and
* Any designation as a small business and/or minority-, veteran-, or women-owned business.

Respondent narrative should be no more than about 2 pages in length, but may extend over a total of three pages. (The instructions above do not count in assessing length.)

## 4.2 Respondent Leadership Team

Please list members of Respondent executive/senior management teams. Include brief descriptions of each member’s role in the organization and relevant experience. Particularly for large organizations, it is not necessary to list every executive/senior manager, but the information should be sufficient to assess the organization’s capacity and institutional experience/knowledge and capacity to provide HMIS software and services. Experience with software/database development, customer service, and HMIS is of particular interest.

|  |
| --- |
| Name of Person. |
| Job Title. | Year |
| Describe organizational role and experience. |
| Name of Person. |
| Job Title. | Year |
| Describe organizational role and experience. |
| Name of Person. |
| Job Title. | Year |
| Describe organizational role and experience. |
| Name of Person. |
| Job Title. | Year |
| Describe organizational role and experience. |

## 4.3 Respondent Staff

Please list roles of Respondent customer service, support, technical, and any other staff who would be involved in any tasks related to implementation and/or ongoing operations for HMIS.

For any role that would be filled by persons already on staff or under contract, create a separate record for each person, provide their names, and briefly describe their relevant experience/skillset.

If a role is filled by multiple staff members with the same title, include the number of persons in that role.

For any role that would require Respondent to hire or contract with additional staff, explain the staffing source (e.g., new hire, contractor, etc.) and describe the experience/skillset required to fill the role.

Specify whether staff would be involved in implementation, ongoing operations, or both.

|  |
| --- |
| Role/Title. |
| Name or Staffing Source. | Choose an item. |
| Experience/Skillset. |
| Role/Title. |
| Name or Staffing Source. | Choose an item. |
| Experience/Skillset. |

# 5 Planning and Implementation

## 5.1 Projected Timeline

Based on Respondent’s experience, provide a projected preliminary timeline for implementation with a high-level list of tasks required by either Respondent or the CoC. Task descriptions may be general, (e.g. “data migration” or “user training”) but list should be comprehensive for implementation of new system to meet requirements.

For each task, list Respondent and CoC roles involved and an estimated (Respondent tasks) or suggested (CoC tasks) time to complete. If the start of any task is contingent on completion of a previous task, note the relationship between the two tasks.

For any task with an associated cost, ensure that the cost is included in the Summary of Costs.

Select one.

Click or tap here to enter text.

## 5.2 CoC/HMIS Lead Roles and Staffing

Based on Respondent experience with other CoCs, please describe the CoC/HMIS Lead roles involved in a successful collaboration with Respondent during implementation and ongoing operation of the HMIS. Assuming appropriate experience and skills, please estimate the level of effort (or FTE equivalent) for each role.

Click the ‘+’ sign at the lower right-hand corner of the box below to add additional records.

|  |
| --- |
| Role/Title. |
| Recommendation. | Choose an item. |
| **Job/Task Description:** Describe. |
| **Experience/Skillset Required:** Describe. |

# 6 Summary of Costs

## 6.1 Standard License

Provide an estimate of the annual cost to license Software with standard HMIS data collection and reporting; estimates should be based on the information in Section 2.1 (Current System Coverage) of the RFP.

|  |  |  |
| --- | --- | --- |
| **Requirement/Deliverable** | **One Time Cost** | **Annual Cost** |
| **License – Standard** | 0.00. | 0.00. |

List factors or conditions that may potentially impact the estimated annual cost provided above (e.g., payment schedule, length of initial contract, licensing of additional functionality, purchase of other services) or cause it to fluctuate (e.g., additional users, additional projects, number of client records). Quantify the impact, if possible.

**Cost Basis / Factors Affecting Cost of Standard License:**

Click or tap here to enter text.

## 6.2 Implementation and Conversion

For each requirement/deliverable below, enter the associated one time and/or annual costs.

* If included in the standard license cost or the cost of another deliverable/requirement, enter $0.
* If any portion of the cost of a requirement is included in the standard license cost, enter only the portion of the cost that is not included.
* If not available from Respondent at all, enter n/a in both cost fields.
* For any task/service that could optionally be provided by the CoC, check the box in the CoC column and don’t enter a cost.

|  |  |  |  |
| --- | --- | --- | --- |
| **Requirement/Deliverable** | **CoC** | **One Time** | **Annual** |
| **Completed Project Plan** |  | 0.00. |  |
| **Comparable Database** (15 users/4 projects) |  | 0.00. | 0.00. |
| **Configuration –** 50 custom fields (estimate?) | [ ]  | 0.00. | 0.00. |
| **Data Mapping and Migration**  |
| HMIS standard data (7 years) | [ ]  | 0.00. | 0.00. |
| \_\_\_ active/\_\_\_ inactive user records and project associations | [ ]  | 0.00. | 0.00. |
| \_\_\_ custom fields | [ ]  | 0.00. | 0.00. |
| \_\_\_\_ uploaded client documents/files | [ ]  | 0.00. | 0.00. |
| **Hosting/Server Management** | [ ]  | 0.00. | 0.00. |

**Notes/Factors Affecting Cost of Conversion and Implementation**

Click or tap here to enter text.

## 6.3 Cost for Features/Functionality/Services Not Included in Standard License

List any requirement from the Requirements Assessment section that is associated with additional cost.

* Do not list any requirement that does not incur additional cost.
* Do not list any cost more than once unless it could be incurred more than once. If a single feature (e.g., an add-on module) will satisfy multiple requirements, include a general description and reference the requirement numbers. For example: *Coordinated Entry Module (requirements 9.1-9.7)*.
* If the listed cost is an estimate subject to significant change, include a brief note to that effect after the description. Example: “Req. 7.3.Upload photos, scans, and other documents to a client record (Estimate – depends on file size / number of uploads)”

|  |  |  |  |
| --- | --- | --- | --- |
| **Requirement/Deliverable** | **CoC** | **One Time** | **Annual** |
| (Highlight this row and click the ‘+’ at the lower right to add additional rows.) |[ ]  0.00. | 0.00. |

# 7 Additional Information

## 7.1 References

List at least three current customers and at least one former customer. References must include at least one HMIS implementation currently using Software as the designated HMIS.

Exception: The CoC’s current vendor is exempt from the requirement to provide a reference from an HMIS implementation and asked to provide references from customers who are not CoC member agencies and who do not operate HMIS-participating projects in Rutherford County.

References will be asked to answer a standard set of questions about factors pertinent to Respondent’s ability to meet the CoC’s HMIS needs, including reliability, user experience, communication, and customer service. Please be aware that the CoC may request additional references if a listed reference is unable or unwilling to answer these questions.

|  |
| --- |
| Name of the organization or business. |
| Name. | Current or Former Customer |
| Email | Phone # |
| Describe the scope of services provided and number of years as a customer. For HMIS implementations, include approximate number of projects and users. |
| Name of the organization or business. |
| Name. | Current or Former Customer |
| Email | Phone # |
| Describe the scope of services provided and number of years as a customer. For HMIS implementations, include approximate number of projects and users. |
| Name of the organization or business. |
| Name. | Current or Former Customer |
| Email | Phone # |
| Describe the scope of services provided and number of years as a customer. For HMIS implementations, include approximate number of projects and users. |
| Name of the organization or business. |
| Name. | Current or Former Customer |
| Email | Phone # |
| Describe the scope of services provided and number of years as a customer. For HMIS implementations, include approximate number of projects and users. |
| Name of the organization or business. |
| Name. | Current or Former Customer |
| Email | Phone # |
| Describe the scope of services provided and number of years as a customer. For HMIS implementations, include approximate number of projects and users. |

**Respondent Notes – References**

Click or tap here to enter text.

## 7.2 Conflict of Interest Disclosure (1-2 pp.)

If Respondent has other relationships or obligations that would represent any actual or perceived conflict of interest with respect to Respondent’s objectivity, impartiality, ability, and/or willingness to perform work for the CoC under the Terms and Conditions included in the RFP, disclose them here. Include the provisions of any formal Conflict of Interest policy.

Enter text.

## 7.3 Confidentiality Policies and Procedures (1-2 pp.)

If Respondent staff have any access to client-level data, describe policies and procedures related to confidentiality, including vetting and/or background checks, training, oversight, and responses to and customer notification of breach. Include the user roles/titles of persons granted access and include the text of agreements signed by staff, if any. If this is not applicable, explain why.

Enter text.

## 7.4 Third Parties

If any task, feature, or functionality requires the involvement of a third party, provide contact information, briefly describe the services provided, and identify the associated requirement(s). Provide a sample service agreement or contract (screenshot/scan/other) below. If costs are not defined in the agreement, include them in the description.

|  |
| --- |
| Name of the organization or business. |
| Name. | Email |
| Click or tap here to enter text. |

## 7.5 Disclosure of Contract Disputes (1-2 pp.)

Provide a brief description and current status of any contract terminations, litigation, censure by professional certifying authority, or other formal action initiated against vendor organization related to contract disputes or non-compliance. If none, so state

Enter text.

## 7.6 Additional Features and Services (Optional; up to 5 pp.)

This section may be used for any information that Respondent would like to provide about Software features and/or Respondent services that are available but not described elsewhere in this proposal because they are not directly relevant to listed requirements.

This section will not be scored and is entirely optional. Screenshots in this section may include Vendor and/or Software name – if included, it will not be reviewed until after de-identified proposal sections are scored.

 Click or tap here to enter text.