

Murfreesboro/ Rutherford County  
Continuum of Care  
(TN-510)

**Request for Proposal: Homeless Management Information System (HMIS)**

Issue Date: Sept. 30, 2021

Questions Due: Oct. 18, 2021

Proposals Due: Oct. 29, 2021

# DESCRIPTION OF WORK

## 1. Objectives

The Housing, Health & Human Services Alliance of Rutherford County (H<sup>3</sup>ARC) is issuing this Request for Proposal (RFP) to secure a web-based Software as a Service (SaaS) for the Murfreesboro/ Rutherford County Continuum of Care (CoC) (TN-510) Homeless Management Information System (HMIS).

The objective of this request for proposal (RFP) is to seek competitive bids and secure a Homeless Management Information System (HMIS) that is compliant with all [HUD HMIS Data and Technical Standards](#), has demonstrated success in data integration into/out of the proposed solution, and with retrieval and integration of data from existing/current HMIS.

## 2. Eligible Applicants

All applicants must meet the following minimum requirements:

- a. At least three years of experience implementing SaaS solutions for HMIS;
- b. At least three years of experience translating federal, state and local grant guidelines and program regulations into software requirements and implementation of software solutions to meet federal, state and local reporting requirements;
- c. At least three years of experience working with private, nonprofit and public entities providing services to persons experiencing homelessness;
- d. At least three years of experience data hosting, data storage, data security, network operations, backup and uptime, as well as redundancy of all systems with multiple users in multiple agencies;
- e. Demonstrated success in legacy data migration (import and export) and ongoing data integration (import and export) using the [HMIS CSV schema](#) mandated by HUD, as well as XML;
- f. Demonstrated ability to collect and generate all HUD required Universal, Common and Program Specific Data Elements and all federally required Reports;
- g. Meet HUD and local CoC compliance requirements of current HMIS data standards and regulations regarding privacy and confidentiality (as currently stated in [CES Management and Data Guide](#) and the [2004 HMIS Data and Technical Standards](#).)

## 3. Contract Term

### a. Data Conversion

The CoC anticipates that the term of the contract resulting from this RFP will be for a minimum of six (6) months. It will take time to evaluate the data within the current HMIS implementation, develop a plan to remove the data, and ensure the veracity of the plan. The conversion timeline will include the upload and testing for a planned go-live on or before September 1, 2022.

## b. HMIS Vendor

The initial term for the contract awarded through this RFP is anticipated to be September 1, 2022 through August 31, 2023. H<sup>3</sup>ARC reserves the option to annually renew the contract awarded through this RFP, for up to four (4) additional years, contingent upon satisfactory contractor performance, availability of funds and community need.

## 4. Scope of Services

### System Features, Functions, and Administration

The CoC will evaluate the Respondent's ability to capture, update, share and report on clients, encounters, assessments, and updates at the program, agency, and aggregate Continuum of Care level. The system needs to be able to set different access levels on universal data elements, common data elements, program specific data elements, and case notes. The CoC will evaluate the system's ability to support mobile experiences, program eligibility functions and master list functions. Data migration timetables and plans will be assessed on their reasonableness and whether they meet requirements. The Respondents will be evaluated on the software's ability to export and import data in HUD standard format and integrate data from external sources (by CSV/XML, API or other methods). In addition, the ease of use and creation of ad hoc reporting tools, the set-up development environment, and the general flexibility and compliance of the system will be weighed.

### System Performance and Reporting

The Respondents will be evaluated based on the scope and functionality of all HUD standard system reports. They will also be evaluated based on the ease of use for ad hoc reporting solutions, compatibility with/for third-party assistance and referral systems and reporting tools and the overall accessibility of data to meet CoC needs. Timing of report generation capabilities (real, near-real, batch) will be evaluated.

### Support, Customer Service and Training

The Respondents will be evaluated on their ability to demonstrate timely, effective, and convenient support to the H<sup>3</sup>ARC team. This will include help desk availability during operating hours, technical support for system administrators, ability to provide tech support for initial implementation, provisions for ongoing system maintenance and updates, ability to make enhancements to comply with changing HUD standards, disaster planning/ system backup processes, as well as satisfactory response times for fix and patch releases. The associated training materials and communication plans to support proposed system changes will also be evaluated.

### Cost Effectiveness/Budget

The proposal will be evaluated on the feasibility, cost-effectiveness, reasonableness, and accuracy of the budget. In addition, they will be compared to both current costs and to other proposals. Proposed costs must be delineated into what is standard, an available add-on/ customization of the system, and one-time costs related to migration or others that are not ongoing costs.

## 6. HMIS History and Status

The Housing, Health and Human Services Alliance of Rutherford County (H<sup>3</sup>ARC), a 501(c)(3) organization, and the designated HMIS Lead Agency for the Continuum of Care (CoC) is charged to administer the Homeless Management Information System (HMIS), the federally-mandated community wide database that drives improvement of homeless services programs. H<sup>3</sup>ARC is issuing this RFP at the direction of the CoC Board of Directors, the primary decision-making group and oversight board for the Murfreesboro/ Rutherford County Continuum of Care (TN-510).

### Current System Coverage

<b>OCTOBER 1, 2019 TO SEPTEMBER 30,2020</b>		
CURRENT SOFTWARE PROVIDER FOR CoC HMIS	Simon Solutions Charity Tracker HMIS	
FTE HMIS SYSTEM ADMINS USER ACCOUNTS	2	
ACTIVE USER COUNT (AT PRESENT)	80	
ACTIVE AGENCY COUNT (AT PRESENT)	12	
ACTIVE PROGRAM COUNT (AT PRESENT)	37	
ACTIVE CLIENT COUNT (2020)	555 (ALL Clients still active/stayers in ALL programs)	
UNDUPLICATED CLIENTS	1576 (ALL unduplicated count of clients Stayers AND leavers)	
SERVICE TRANSACTION COUNT (2020)	32881 SERVICES PROVIDED	
UNDUPLICATED # OF CLIENTS WHO RECEIVED A SERVICE	3789	
CLIENT ENTRY/EXIT COUNT (2020)	786/857	
TRAINED USERS (2020)	39 (HMIS Refresher Training 13, HMIS New User Training 26)	

## 7. RFP Definitions

Within the context of this document and proposals submitted in response to it, any term listed below will be interpreted according to its accompanying definition.

**Bed Coverage Rate:** the number of HMIS participating beds divided by the number of year-round beds dedicated to homeless persons in the geographic area covered by the CoC. Beds funded by victim service providers will not be included in the calculation.

**Collaborative Applicant:** the private nonprofit organization, State, local government, or instrumentality of State and local government that has been designated by the Continuum of Care to apply for a grant for Continuum of Care planning funds under 24 CFR part 578 on behalf of the Continuum. For TN-510, H<sup>3</sup>ARC serves as the Collaborative Applicant.

Continuum of Care, CoC: the group organized to carry out the responsibilities required under 24 CFR part 578 and that is composed of representatives or organizations, governments, businesses, advocates, public housing agencies, school districts, social service providers, mental health agencies, hospitals, universities, affordable housing developers, law enforcement, organizations that serve homeless and formerly homeless veterans, and homeless and formerly homeless persons to the extent these groups are represented within the geographic area and are available to participate.

Contributing HMIS Organization (CHO): an organization that participates in and contributes data to the HMIS.

Homeless Management Information System (HMIS): the information system designated by the local CoC to comply with the requirements of the McKinney-Vento Act, 24 CFR part 578, and related HMIS Notices and is used to record and analyze client, service, and housing data for individuals and families who are homeless or at risk of homelessness.

HMIS End User: an individual who enters or uses data in an HMIS or a comparable database approved by the CoC.

HMIS Lead: the non-profit organization designated by the CoC in accordance with 24 CFR part 578 to operate the CoC's HMIS on its behalf. Also, the local administrators of the HMIS which provide oversight, training, end user support, new agency and new program set-up. For TN-510, H<sup>3</sup>ARC serves as the HMIS Lead.

HMIS Vendor: a contractor who provides the SaaS and accompanying materials or services for the operation of an HMIS.

Proposal: a bid to convert, implement, and operate an HMIS SaaS submitted in response to this request.

Respondent: an HMIS vendor who submits a proposal in response to this RFP.

Third Party: any organization, individual, or group other than the Respondent and the CoC.

## 8. Respondent Specific Requirements

- a. SAM registration requirement. Applicants must be registered with SAM before submitting their application. In addition, applicants must maintain an active SAM registration with current information while they have an active contract with H<sup>3</sup>ARC.
- b. DUNS Number Requirement. Applicants must provide a valid DUNS number, registered and active at SAM in the application. DUNS numbers may be obtained for free from [Dun & Bradstreet](#).

## 9. Proposal Process

All questions and comments about the RFP and proposal process must be in writing and emailed to [HMISrfp@h3arc.org](mailto:HMISrfp@h3arc.org).

### a. Timeline

The following is a projected timeline. H<sup>3</sup>ARC may determine that revisions to the RFP and/or modifications to the timeline are required to achieve the best results.

Activity	Begin	End/Deadline
Release of RFP & posted to the H <sup>3</sup> ARC website	Sept. 30, 2021	
Vendor questions and answer period	Sept. 30, 2021	Oct. 18, 2021
Proposals accepted		Oct. 29, 2021
Phase 1 threshold review		Nov. 5, 2021
Phase 2 proposal evaluation and vendor notification	Nov. 8, 2021	Nov. 19, 2021
Phase 3 demonstration with HMIS Evaluation Panel	Dec. 1, 2021	Dec. 10, 2021
User community comment period	Dec. 13, 2021	Dec. 17, 2021
Evaluation Panel Report		Jan. 6, 2022
Vendor Selection, TN-510 Board Approval		<b>Jan. 6, 2022</b>
Contract Review	Jan. 10, 2022	Feb. 24, 2022
Contract Date, TN-510 Board Meeting		Mar. 3, 2022
HMIS Implementation Planning, Migration, User Training	July 3, 2019	Sept. 1, 2022
Go-Live		Sept. 1, 2022

The timeline is subject to modification as needed; changes will be posted to H<sup>3</sup>ARC website and vendors affected by timeline changes will be notified via email.

A timeline for contract negotiation and a detailed project plan for implementation will be developed in collaboration with the vendor(s) selected through this process.

### b. Request for Letters of No Bid

The CoC would appreciate a brief, informal email from any vendor who decides against submitting a proposal summarizing factors involved. Email should be sent to [HMISrfp@h3arc.org](mailto:HMISrfp@h3arc.org).

### c. Deadline for Proposal Submission

Proposals must be delivered to [HMISrfp@h3arc.org](mailto:HMISrfp@h3arc.org) no later than 5:00PM CST (Central Standard Time) on the day of the deadline.

Respondents will receive an email on the business day following the deadline confirming that the proposal was received. Proposals received after the deadline will be excluded from consideration and Respondents will be notified.

#### d. Proposal Withdrawal

Respondents may withdraw a proposal at any point in the process. A notification of withdrawal should be sent to [HMISrfp@h3arc.org](mailto:HMISrfp@h3arc.org) from the email account of the proposal point of contact or the authorized representative listed in the proposal. A brief explanation of the reason(s) for the withdrawal would be appreciated.

## 10. Proposal Content

This RFP is being published with a companion Proposal Template; all submissions should use the template.

- The template was created in MS Word and includes content controls (drop down lists, plain text boxes, and rich text boxes) that must be used to complete the proposal correctly. The document is compatible with current versions of MS Word; the content controls are not compatible with OpenOffice Writer or Google Docs.
- The template has a .docx extension; electronic copies of proposals must also have a .docx extension and retain all headings, subheadings, margin settings, and page breaks in the original. Use of Navigation view may be helpful.
- Respondent may add section headers to narrative responses as appropriate.
- Responses should be relevant and fully responsive to each requirement listed.
- The use of screenshots to illustrate narrative is encouraged. Please do not include the name of software or respondents in illustrations so these can be reviewed anonymously.
- Non-standard and vendor-specific terminology should be avoided or explained so that responses are clear and understandable in the context of HUD requirements and those identified in the Proposal Template.
- As a final step, please ensure that page numbers are correct in the respondent proposal template before submitting.

### Submissions:

Send one complete copy of the proposal in electronic (.docx) format by email attachment with a file name that clearly identifies the respondent.

## 11. Evaluation Process

### a. Phase 1: Threshold Review

Proposals received by the submission deadline will be reviewed by H<sup>3</sup>ARC staff and designated representatives of the CoC to ensure that they meet threshold criteria. Any proposal that does not meet the minimum standards listed below will be excluded from further consideration.

Criteria	Score
Proposal received on time	Pass/Fail
Attachment with a .docx version of proposal	Pass/Fail
All sections of Proposal Template are complete	Pass/Fail

Respondents whose proposals have been eliminated will be provided with a reason.

Prior to forwarding to the evaluation panel, de-identified versions of proposal sections will be produced from the electronic copies submitted by Respondents and grouped together. Respondent names, software names, and other identifying information will be replaced with general terms (e.g., 'Vendor'). The intent of this is to facilitate scoring each section independent of others and a fair process.

### b. Phase 2: Proposal Evaluation

The CoC will score the content of proposals by section. There are both objective and competitive/subjective elements to scoring in Phase 2. Initial evaluation and comparative review of proposal sections will be blind, based on de-identified copies prepared after Phase 1, to allow evaluators to assess the content of each individual section neutrally and independent of other sections.

The points assigned to each area of requirements are listed in the response template.

Cover letters and full proposals, as submitted, will be considered prior to finalizing scores in other areas.

The CoC may request additional information during Phase 2 to ensure an accurate assessment. Regardless of overall score, there are pass/fail elements involved in Phase 2. Proposals will not be considered in Phase 3 if:

- Requirements Assessment indicates that the proposed solution cannot meet the CoC's needs;
- The amount of customization required to meet the CoC's needs, based on the narrative responses in the Technical Assessment and the Project Plan, is substantially greater than other Respondents and/or presents an unacceptable risk to meeting a target date for implementation or meeting overall needs; or
- The cost analysis, based on both the Summary of Costs and the CoC Staff section, exceeds the CoC's overall HMIS budget.

All Phase 2 Respondents will be notified of their proposal status by email at the completion of the phase. Respondents whose proposals have been eliminated will be provided with a reason.



**c. Phase 3: Demonstration Evaluation**

Based on the proposals, finalists will be invited to schedule a demonstration to present to and meet with an evaluation panel. A detailed agenda will be provided in advance. In general, this is expected to include:

- A presentation by Respondent covering organizational capacity, software functionality, and overall ability to meet CoC requirements followed by a question and answer session; and
- A multi-level (regular user, HMIS Lead user, etc.) hands-on walk-through of software functionally. This will require the availability of a sandbox/training site with compatible browsers listed by Respondent in the proposal. User experience will be evaluated according to the following criteria:
  - Intuitive Design: how easy is it to understand the layout of the software?
  - Learning: how quickly can an inexperienced user orient themselves?
  - Efficiency: how quickly can an experienced user accomplish tasks?
  - Subjective: overall assessment of the software’s suitability to a front-end user’s work.

Respondents should be prepared to demonstrate any aspect of functionality described in the proposal. If the proposal includes custom development, Respondents may be asked to present sketches, wireframe mockups, diagrams, etc.

Phase 3 scoring will focus on the software and consideration of community feedback.

Scoring Area	Points
Overall Quality of Presentation/Content	30
User Experience	30
Configurability/Admin User Experience	20
Demonstration Consistent with Proposal	10
Community Feedback and Reference Checks	10
<b>Total</b>	<b>100</b>