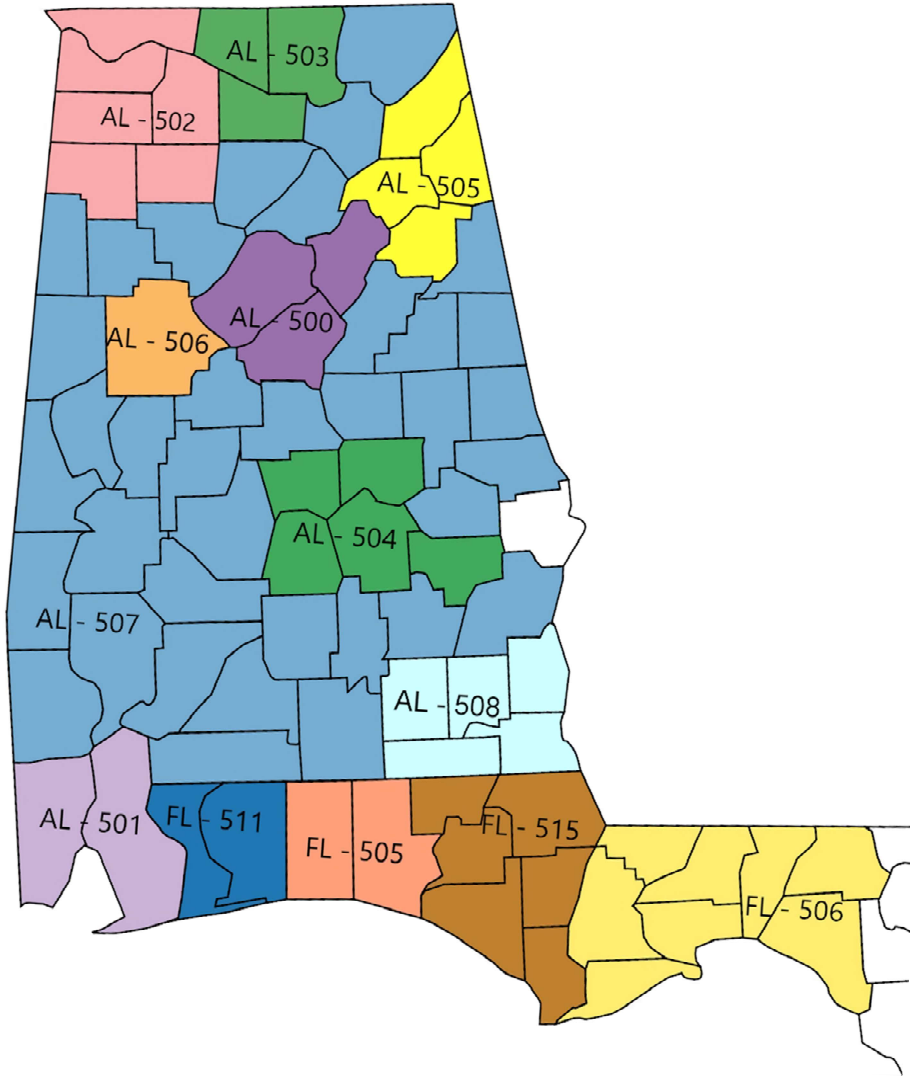


Request for Proposal
for
Program Management Information System of the Southeast
(PromisSE)



July 8, 2024

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Description of Work

Objective

The PromisSE (Program Management Information Systems of the Southeast) Steering Committee is seeking proposals for a HUD-compliant, web-based Software as a Service (SaaS) for our multi-CoC Homeless Management Information System (HMIS). HMIS provides the most thorough and current insight into our collaborative endeavors and effectiveness in combating homelessness. As technology advances and our communities increasingly utilize HMIS to foster connections and enhance system planning, the objective of this Request for Proposals is to procure a modern, user-friendly experience that meets current community needs and can adapt to future changes.

PromisSE Implementation Background

The PromisSE HMIS system began with a few CoCs and HMIS Lead Agencies sharing the implementation, and has grown to 13 CoCs/Lead Agencies today. Most agencies are non-profit and a few are local government agencies. Each of the 13 agencies contributes to the foundational cost of the HMIS system, in addition to covering expenses for their individual user licenses and report licenses. This model is a cost-effective way to reduce HMIS expenses, while allowing for geographic data sharing of client data.

PromisSE Governance Structure

The PromisSE Steering Committee oversees the HMIS Policies and Procedures, which are shared by all agencies participating in HMIS.

PromisSE Continuums of Care

AL-500	AL-504	AL-507	FL-506
AL-501	AL-505	AL-508	FL-511
AL-502	AL-506	FL-505	FL-515
AL-503			

A map is available here:

<https://public.tableau.com/app/profile/one.roof/viz/ContinuumofCareMap/Dashboard1>

PromisSE Database

Component	Count
Users	914
System Administrators	50
Custom Report Developers	49
Custom Report Viewers	101
Active Projects	786
Active Agencies	170
Unique Question Fields	3361
Entry/Exits past 7 years	1,318,500
Unique Client Count	370,000
Custom Reports	100

Project Types

Project Type	Count
Coordinated Entry	36
Day Shelter	2
Emergency Shelter	128
Homelessness Prevention	100
Other	55
PH – Housing Only	20
PH – Housing with Services	2
PH – Permanent Supportive Housing	39
PH – Rapid Re-housing	158
Safe Haven	1
Services Only	120
Street Outreach	62
Transitional Housing	63

Funding Sources

HHS:PATH - Street Outreach & Supportive Services Only

HHS:RHY - Basic Center Program (prevention and shelter)

HHS:RHY - Transitional Living Program

HUD:CoC - Joint Component TH/RRH

HUD:CoC - Permanent Supportive Housing

HUD:CoC - Rapid Re-Housing

HUD:CoC - Safe Haven

HUD:CoC - Single Room Occupancy (SRO)

HUD:CoC - Supportive Services Only

HUD:CoC - Transitional Housing

HUD: ESG-CV

HUD:ESG - Emergency Shelter (operating and/or essential services)

HUD:ESG - Homelessness Prevention

HUD:ESG - Rapid Re-Housing

HUD:ESG - Street Outreach

HUD:HOME (ARP)

HUD:HOPWA - Permanent Housing (facility based or TBRA)

HUD:HOPWA - Transitional Housing (facility based or TBRA)

HUD:HUD/VASH

HUD:PIH (Emergency Housing Voucher)

HUD: Public and Indian Housing (PIH) Programs

Local or Other Funding Source (Please Specify)

VA: CRS Contract Residential Services

VA: Grant and Per Diem Program (Retired)

VA:Supportive Services for Veteran Families

Coordinated Entry

Each of the 13 CoCs operate their own Coordinated Entry system. To efficiently match people experiencing homelessness with the best available resources, Coordinated Entry systems need readily accessible data. Real-time data extraction from HMIS is crucial for communities to perform essential tasks, such as providing clients with status updates, assessing their needs and vulnerabilities, and issuing targeted program referrals.

PromisSE is a shared system where clients can choose to make their data available to participating agencies for service coordination. While this benefits the multiple CE systems, it also highlights the importance of obtaining and documenting client consent. If a client opts not to share their information, access to their data must be restricted.

To sustain current service levels and enable future improvements, PromisSE's CE systems need an HMIS that supports customization, allows real-time data access, and ensures data security. Neglecting any of these components could turn the HMIS into an obstacle to housing for those experiencing homelessness.

Scope of Services

Proposals should address all sections of the scope of services

Features and Functionality

The chosen vendor must adhere to and deliver the following criteria, unless explicitly stated as "Desired." If the vendor cannot meet the minimum requirements, they should detail their strategy for meeting or surpassing each requirement.

System Features

Users

1. The system should allow users to reset their passwords or unlock their accounts using self-service functionality. This process should incorporate two-factor or multi-factor authentication, and passwords must adhere to complexity and length requirements.
2. Users should be automatically logged out of the system after a period of inactivity.
3. User access to data should be restricted based on their project associations.
4. The system should enable users to communicate through notifications and direct messaging (user-to-user messaging). (This feature is desired.)

Data Entry

1. Robust client record search functionality to prevent the creation of duplicate client records, such as displaying records with partial spelling matches.
2. Intuitive guided workflows to streamline processes for users.
3. Integrated ID card functionality for individuals to use for check-in, which will create enrollments and/or services, and can be generated from HMIS and printed on a third party printer or ID machine.
4. Enable the creation of bed reservations within the system.
5. Implement measures to prevent the creation of enrollments in specific situations, such as during shelter bans.
6. Allow users to upload documents and files to client records.
7. Grant users at one agency the capability to input data on behalf of a second agency.
8. Printable blank and completed intake forms.
9. Batch import of data from agencies who do not use HMIS.
10. The ability to search client's Entries and Services.
11. Auto exit and default end date functionality within the system. (Desired)

12. The ability to pause data entry workflows and resume at the same point during future sessions. (Desired)
13. A mechanism for easily printing the full contents of a client record in a user-friendly format. (Desired)
14. Tracking of real-time reservations, occupancy, and availability of beds and units. (Desired)

Case Management

1. Provide an intuitive interface for recording case management information, encompassing tasks such as setting reminders, note-taking, uploading external documents, and optionally, appointment scheduling and text or email alerts for clients.
2. Include a built-in calendar feature to manage client appointments, due dates, and other relevant events. (Desired)
3. Enable streamlined printing functionality for individual client records.
4. Tracking referral data.

Coordinated Entry

1. Real-time by-name list and priority list. (Desired)
2. Real-time eligibility calculations, client choice in Coordinated Entry. (Desired)
3. Built-in alerts on client status within Coordinated Entry System. (Desired)
4. Mechanism for submitting and tracking project vacancies/openings. (Desired)
5. Capacity to host VI-SPDAT and other common prioritization tools.

Fund Management

1. Ability to create funding sources.
2. Ability to link services to funding sources.
3. Allow users to enter dollar amounts for services provided.

Other

1. Ensure compatibility with mobile devices and optimize the user experience to utilize device features such as geolocation, cameras (for secure document uploads), and touchscreen capabilities (for e-signatures). (Desired)
2. Allow agencies to directly review Project Descriptor Data Elements (PDDE) and Bed Unit Inventory and submit changes/updates, with system administrators having the ability to review and approve changes before they become official. (Desired)
3. Provide a portal for individuals to access their own HMIS client record and update contact information as needed. (Desired)
4. Implement an auto-calculation feature for total active income. (Desired)

Federal Compliance

HMIS Data Standards

1. Comply with all current and future HUD HMIS Data Standards (2024) and Technical (2004) Standards, data elements, response categories, CSV/XML specifications, Federal Partner reporting requirements (including CoC, Emergency Solutions Grant (ESG), Housing Opportunities for Persons with AIDS (HOPWA), Projects for Assistance in Transition from Homelessness (PATH), Runaway Homeless Youth (RHY), and all U.S. Department of Veteran Affairs (VA) programs).

2. While compliance with each component of the HMIS Data Standards is required of the vendor, additional scrutiny will be given to the following data elements:
 - a. Enrollment ID - Must have the ability to connect data elements that are collected for each enrollment and/or have multiple collection points to a specific enrollment and/or collection stage.
 - b. Personal ID - Must have a consistent application of how a Personal ID (Unique ID) is used for all federal and system-wide reporting (e.g., System Performance Measures reports, Longitudinal Systems Analysis report, etc.). If the system allows for multiple records of the same person to be created, the system must deduplicate the multiple records so that a single Personal ID is used for all reporting.

HUD and Federal Partner Reporting

Built-in standard reports:

CoC APR	Coordinated Entry APR
ESG CAPER	PATH Export
SSVF Export	RHY Export
System Performance Measures	LSA Export
HIC Export	

Other Reporting

Call Records	Clients Served
Unit Report	Data Quality Framework
Duplicate Client	Duplicate Entry
Fund Availability	Fund Usage
Needs Report	Referral Report
Service Transactions	

HMIS Data Standards Changes

1. The vendor is required to engage in dialogue with HUD during planning and development of HMIS Data Standards changes. This includes participation in meetings with HUD, as well as access to training opportunities and quality assurance processes.
2. Upon the public release of HMIS Data Standards changes finalized by HUD, the vendor must communicate with the HMIS Lead regarding the timeline and progress of implementing these changes.
3. The vendor must establish a comprehensive quality assurance process to test and ensure compliance with HMIS Data Standards changes before their effective date.
4. The vendor must offer additional training resources on data entry and collection to educate users on how HMIS Data Standards changes have been integrated into the HMIS software.
5. The vendor must provide a test environment, such as a demo site, at least one month prior to the effective date of HMIS Data Standards changes. This allows users to familiarize themselves with the changes and ensure smooth transition.

System Administration

General Functions

1. The system should allow customization of access to different components at both the project and user levels.
2. Users should be able to designate standard and custom fields as mandatory or optional for data collection.
3. Implement a mechanism for non-admin users to view client-level data with restricted visibility, often referred to as "Shadow Mode."
4. Provide options for assessment and field customization, including the ability to create and apply conditional logic (dependencies) or jump logic.
5. Include a built-in tool for managing duplicate client records and merging multiple records into a single one.
6. Enable tailored data access permissions for both the client-level data portal and the reporting portal, ensuring that permissions, visibility, and access can be easily transferred between live client data and reporting platforms.
7. Implement functionality to issue alerts and notifications across the entire system.

Project Administration

1. Provide system administrators with the ability to create and manage custom fields for logging data specific to individual project providers.
2. Allow projects to be associated with multiple funder contracts, enabling separate tracking and reporting of performance outcomes for each contract.
3. Customize services and enrollment options at the project level to accommodate multiple funding sources.
4. Enable configurable automated alerts, such as reminders for annual assessments or notifications for skipped questions.

User Administration

1. Provide system administrators with the ability to create and manage custom fields for logging data associated with individual users, such as tracking training completion. (Desired)
2. Implement functionality to create, activate, and deactivate user accounts as needed.
3. Include manual password reset functionality for users to regain access to their accounts.
4. Provide tools within the system to manage licenses effectively.
5. Offer a range of user roles with defined permissions and access levels, including basic end user, read-only access, agency administrator, and system administrator roles.

Customer Service and Technical Support

Installation and Customization

1. Develop a comprehensive conversion strategy for transitioning from the existing system, including an estimated timeline for conversion and procedures for verifying data accuracy.
2. Enable seamless migration of data between systems upon request, without limitations on frequency or volume, and ensure compatibility with HUD standard CSV and XML formats.
3. Coordinate all activities related to the implementation and installation of the HMIS to ensure smooth integration.

4. Provide a transparent roadmap outlining upcoming software changes and future development plans.
5. Establish a structured process for collecting feedback on future software development initiatives.
6. Implement a protocol for receiving, reviewing, and responding to both automated and requested software fixes within agreed-upon timeframes.
7. Actively participate in the HUD HMIS Vendor Work Group and demonstrate willingness to implement required changes within specified timeframes.

Training and Support

1. Offer train-the-trainer sessions for HMIS Lead Agency staff as part of the installation process.
2. Provide continuous technical support throughout the duration of the contract.
3. Enable online submission of help/support requests for the entire contract period.
4. Offer after-hours emergency support services.
5. Supply training and support materials to assist users with navigation.
6. Implement User Acceptance Test (UAT) procedures and provide a dedicated test environment for every upgrade, patch, enhancement, and other system changes.
7. Set up a designated training environment for user training sessions and demonstrations.
8. Establish a designated testing environment accessible to lead agencies and system administrators.
9. Implement an integrated ticketing system for both users and system administrators.
10. Ensure well-coordinated timing, content, communication, and testing for patch releases.
11. Maintain an actively updated library of training materials, including comprehensive manuals and online training resources, for training end users.

Reporting and Export/Import Functionality

1. The system should support ad-hoc live data reporting for immediate needs, while more complex reporting requirements are handled by a dedicated reporting system.
2. Ensure that data models and schema are clearly documented and include an up-to-date data dictionary.
3. Enable users to create custom data queries and elements, which can be stored and rerun as necessary.
4. Allow users to create custom reports and data views, providing modern data visualizations, tabular reports, and options for data exports.
5. Utilize industry-standard languages and tools for user-level report and query development.
6. Provide data exports in various standardized formats (e.g., CSV, JSON, XML), including the ability to customize exports to meet specific organizational requirements. Data security measures should apply to exports, allowing for different levels of visibility.
7. Offer data import and upload capabilities supporting standardized formats (CSV, JSON, XML), with the potential for client-level data uploads at specific access and visibility levels.
8. Implement a granular security model allowing customized reports to be shared and run at different visibility levels, along with clear and detailed report-level security audits.
9. Provide a clear roadmap for reporting and data updates, with a commitment to maintaining the reporting product's relevance and accuracy.

10. Enable reporting on providers within custom groups defined by user-set criteria, including the ability to create custom reporting groups by provider, with additional functionality as needed.
11. Standard reports must be able to filter results by CoC Code.

Data Security and Privacy

Data Ownership

The vendor does not possess ownership of the data and cannot utilize HMIS data unless explicitly authorized by the PromisSE Steering Committee. In case of contract termination, all records must be securely destroyed following the transition period.

Data Visibility

Data sharing should be controllable at the data element level.

User Account Security

1. The platform should implement the latest security best practices across all aspects of account management.
2. Passwords must meet minimum complexity requirements.
3. Accounts should support two-factor authentication, including options such as device authentication, software token authentication, hardware key authentication, and one-time password authentication.
4. User accounts should automatically become inactive after a specified period of inactivity.

Activity Audit

1. Log system activity in an easily accessible method for analysis and audit trail.
2. Provide access to system activity via intuitive, robust audit tools.
3. Alerts and warnings based on system activity should be available and configurable.

Data Storage

Data Hosting and Maintenance

1. Provide web-based data hosting, backup, recovery, and storage services for the duration of the contract.
2. Host and maintain both the data platform and the application software used for data collection management.
 - i. Ensure that server software and hardware remain up to date with regular application of security patches.
 - ii. Report and promptly address security issues following a documented disclosure process, providing regular updates to customers about these issues and their fixes.
3. Ensure consistent updates to the software and platform, allowing it to remain current without compromising security or critical access.
 - i. Provide a documented application roadmap demonstrating delivery of previous roadmap elements within the identified timeframe.
 - ii. Communicate software updates clearly and accurately, and offer test platforms well in advance to facilitate customer testing and feedback prior to updates.
4. Ensure fully encrypted API access via SSL/TSL.

- i. Utilize industry-standard authentication (OAuth 2.0) with comprehensive support for data scoping and token revocation.
 - ii. Subject API access to the same audit trail, visibility, access level permissions, and tracking as other system functions.
5. Host software on servers located in Tier IV data centers with additional geographic redundancy to maintain 99.95% uptime.
 6. Conduct thorough root cause analyses for unplanned downtimes and provide reportable results to users.
 7. Conduct regular disaster recovery testing for both the software and supporting systems, with reportable results.
 8. Subject the software and supporting systems to external security reviews, with reportable results.
 9. Implement multiple daily backups of data, including block-level incremental backups and snapshot/in-place recovery capabilities.
 10. Ensure server capacity, downtime, and redundancies are managed effectively.
 - i. Provide details on the number of unplanned outages, downtime experienced in the past year, and outline the process for restoration, including identification of outages, resource deployment, root cause isolation, resolution, and communication procedures.

Data Warehousing

1. Implement a comprehensive data warehouse with all necessary features for data reporting and analysis.
2. Ensure that the data warehouse includes a well-documented and regularly updated data schema and data dictionary.
3. Keep the warehouse data current with regular updates from live data, allowing for clear tracking and auditing of changes.
4. Maintain a minimum service level of 99.95% uptime for the data warehouse.
5. Establish a granular and robust security model for managing warehouse data, accommodating various access needs and visibility levels. This includes implementing an audit trail and access level tracking for both data and reports.
6. Provide fully encrypted API access to the data warehouse via SSL/TSL.
 - i. Utilize industry-standard authentication (OAuth 2.0) with comprehensive support for data scoping and token revocation.
 - ii. Ensure that API access is subject to the same audit trail and access level permissions and tracking as other system functions.
7. Develop a clear roadmap for data warehouse updates, including support for any significant transitions.
8. Ensure that updates and changes to the data warehouse are clearly documented and fully completed.
9. Allow for updates to the data warehouse that enable temporary testing and comparison of older and newer data builds to facilitate transition and custom testing processes.

Comparable Database

As the HMIS Leads, PromisSE HMIS Lead Agencies do not directly oversee the HMIS comparable databases utilized by Victim Service Providers (VSP). However, HMIS Lead Agencies play a supportive role with VSPs funded by HUD CoC and HUD ESG, who are obligated to utilize an HMIS comparable

database. Despite VSPs being prohibited from using HMIS, HMIS Lead Agencies endeavor to provide them with expert support in interpreting the HMIS Data Standards and the mandatory HUD reports, such as the CoC APR and ESG CAPER. With this in mind, please provide details of any software within your portfolio that satisfies the requirements of an HMIS comparable database for VSPs.

Data Migration Experience

Please outline your data migration strategy for communities, detailing the assigned staff resources, both from your team and from the HMIS lead, as well as project tasks and a sample timeline. Additionally, explain your communication approach before, during, and after the migration process.

Key points to address include:

- Your quality assurance and testing methodology.
- An example of a migration that presented unexpected challenges, detailing how you communicated, collaborated, and resolved the issue.
- Previous implementations you've handled, including the number of agencies, projects per agency, total users, users per agency, unique clients in the system, server space allocated to the database, and the blackout period length.
- A high-level list of tasks required for migration and post-migration support.
- A projected timeline for a new customer in 2024, including the main tasks and roles involved from the CoC, HMIS lead, and software vendor engineering team.

Summary of Cost

Please describe the following cost considerations:

Cost Model

Please provide details of your standard cost model, including information about the billing structure. Describe how costs are determined, such as by license type, number of providers, database size, etc. Specify any annual costs, one-time costs, or other relevant expenses. Additionally, mention if there are any caps or limits to annual increases.

Factors Affecting Cost of Standard License

Enumerate factors or conditions that influence the estimated annual cost mentioned earlier. This could include the payment schedule, length of the initial contract, licensing of additional functionality, purchase of other services, or any elements that may cause the cost to vary, such as additional users, projects, or client records.

Costs Not Included in Standard License

List any requirements that come with an additional cost. Do not include any requirements that do not incur extra expenses. Avoid listing the same cost more than once unless it applies to multiple requirements. For features that could satisfy multiple requirements (e.g., an add-on module), provide a general description. If the listed cost is an estimate subject to significant change, include a brief note to indicate this after the description. For example: "Req. 7.3. Upload photos, scans, and other documents to a client record (Estimate – depends on file size / number of uploads)."

Data Migration Costs

Describe costs specific to data migration, including factors or conditions that apply to data migration costs and corresponding costs of each.

Eligible Applicants

Required Experience

All applicants must meet the following minimum requirements:

- Preferred five years (minimum of three years) of experience in developing and providing HMIS services.
- Preferred five years (minimum of three years) of experience in translating federal grant guidelines and program regulations into software requirements and implementing software solutions to meet federal, state, and local reporting standards.
- Preferred five years (minimum of three years) of experience working with private, nonprofit, and public entities that provide services to individuals experiencing homelessness.
- Preferred five years (minimum of three years) of experience in data hosting, storage, security, network operations, backup procedures, and ensuring uptime, redundancy, and system reliability for large jurisdictions with multiple users across various agencies.
- Demonstrated success in legacy data migration (import and export) and ongoing data integration across multiple software solutions using the CSV schema mandated by HUD.
- Proven ability to collect and generate all HUD-required Universal and Program-Specific Data Elements and Reports.
- Compliance with all HUD and local CoC regulations regarding HMIS data standards, privacy, and confidentiality.
- Majority of current HMIS software contracts must be with HMIS Lead Agencies.

Organizational Capacity and Financial Solvency

Please ensure that your application includes the following documents. If you do not possess or cannot provide any of these documents, kindly provide an explanation for their absence:

- Articles of Incorporation, including any amendments, and by-laws.
- Audited financial statements for the last two fiscal years, along with the OMBA-133 Single Audit if required. If no audit was conducted, please provide a written explanation.
- Conflict of Interest Policy.
- Service Organization Control (SOC 2) Report.
- Resumes or short biographies of the Executive Leadership or Senior Management Team.
- Evidence of General Liability and Workers Compensation Insurance.
- Litigation and/or Contract Compliance Certification.
- Confidentiality Policies and Procedures.

Third Parties

If any task, feature, or functionality necessitates the engagement of a third party, please furnish their contact details, offer a brief overview of the services they render, and specify the associated

requirement(s). Additionally, attach a sample service agreement or contract (screenshot/scan/other) below. If the agreement does not specify costs, please include them in the description.

References

Please provide a list of at least three current customers that are HMIS Lead Agencies, including the following details for each:

- Name of the customer
- Email address
- Phone number
- HUD Continuum of Care (CoC) Code
- Scope of services provided
- Number of years as a customer
- Approximate size of the implementation

Note: PromisSE's current vendor is exempt from the requirement to provide a reference from an HMIS implementation.

References will be required to respond to a standard set of questions regarding factors relevant to the respondent's ability to meet PromisSE's HMIS needs. These factors include reliability, user experience, communication, adaptability, and customer service.

PromisSE reserves the right to pursue or request additional references if a listed reference is unable or unwilling to answer these questions.

Proposal Content and Submission

Format

All proposals must comprehensively address each item outlined in the Scope of Services sections of this RFP, which include: data philosophy, features and functionality, data migration experience and timeline, summary of costs, organizational capacity and financial solvency, and references.

Section 1: Cover Letter (1 page maximum)

Introduce your organization briefly, including the following details: years of experience providing HMIS software solutions, scope of provided software solutions, number of employees, headquarters location, operational hours in the CST zone, primary contact person's name, and phone number. The letter must be signed by an authorized signatory.

Section 2: Scope of Services (20 pages maximum)

Describe proposed services in alignment with the Scope of Services section in this RFP, referencing each section title and number. Provide details on how your software addresses each required service or could potentially do so with additional development. Include relevant screenshots. For any services listed as "Desired," specify if the function is currently available or in development.

Section 3: Organization, Philosophy, and Experience (4 pages maximum + requested documentation)

Detail your organization's experience in providing HMIS software solutions.

Section 4: Planning and Cost (10 pages maximum)

Present a project plan outlining all activities, resources, estimated timelines, and one-time & ongoing costs necessary for successful project implementation.

Submission

Please submit proposals electronically by August 30, 2024 at 11:59PM CST. Proposals should be in pdf format and separate files should be in a compressed zip folder.

Email the completed application and documents to promiseseimplementationleads@oneroof.org. Applications will not be accepted via facsimile or mail.

Proposals received after August 30, 2024 at 11:59PM CST, will not be accepted.

Amendments and/or addendums submitted after the proposal deadline will not be reviewed. However, the PromisSE Steering Committee reserves the right to request clarification of unclear or ambiguous statements made in the proposal.

Proposal Review Timeline

Activity	Date
RFP Released	July 8, 2024
Q & A Period	July 8 to August 2, 2024
RFP Addendum Issued (if applicable)	August 16, 2024
RFP Deadline	August 30, 2024
RFP Review	August 30 to September 13, 2024
Finalist Vendors Notified	September 16, 2024
Finalist Vendor Demonstrations	September 27 to October 11, 2024
Vendor Selection	November 1, 2024
HMIS Implementation Planning, Migration, and User Training	TBD
Go Live Date	TBD

Proposal Evaluation and Selection

The PromisSE Steering Committee prioritizes transparency and inclusivity throughout the process. While board members ultimately hold voting authority, we emphasize power sharing and participation at every stage of the review process. HMIS and CoC Lead Agency staff from all 13 CoCs are providing logistical support for tasks such as drafting the RFP, soliciting proposals, organizing responses, and facilitating the review and scoring process. This approach aims to enable you and other key partners to actively engage without bearing the administrative burden.

As the process unfolds, participation may fluctuate. At its most inclusive, there will be a public comment period for the RFP and an open invitation for finalist demonstrations. During the review of proposals, partners including yourselves, the PromisSE Steering Committee, HMIS Lead Agency staff, HMIS users, and other key stakeholders will be invited to review and score materials.

To fulfill the PromisSE Steering Committee’s mission, proposals will be evaluated based on perceived qualities of equity, effectiveness, efficiency, compliance, and adaptability.

The contract will not necessarily be awarded to the proposal that receives the highest rating. The PromisSE Steering Committee will award the contract to only one responsive and responsible proposer submitting the most advantageous proposal taking into consideration the quality requirements, evaluation criteria and composite ratings, interview, references and price. Before awarding the contract, we may request additional information from the proposer.

Authority to Select and Designate Vendor

The 13 Continuums of Care, HMIS Lead Agencies, and the PromisSE Steering Committee have established a Memorandum of Understanding (MOU) delineating roles and responsibilities. This MOU, coupled with Steering Committee bylaws, specifies that the PromisSE Steering Committee designates the software vendor and platform used. As such, the representative voting members are accountable for garnering the support and input of their respective constituencies.

Requests for Clarification

All requests for clarification to the RFP must be received by the PromisSE Steering Committee by August 2, 2024. All responses to requests for clarifications will be posted by August 16, 2024.

Threshold Review

Proposals will be reviewed for completeness. Proposals that do not include all the requested documents, demonstrate Proposer’s eligibility, project appropriateness and demonstrated ability to perform the services to scale as detailed in the RFP may be rejected at the PromisSE Steering Committee’s sole discretion.

Threshold Requirements

Requirement	Response	
	Yes	No
Proven track record of successful software implementation: <ul style="list-style-type: none"> • Experience leading recent projects that implemented the software on time and within budget. • A history of completing projects and customizations that meet and exceed customer needs. 		
The proposed HMIS will facilitate full and accurate collection of all HUD- and Federal Partner-mandated data elements.	Yes	No
Proposer is prepared to contractually commit to ongoing compliance and support of the latest HUD and Federal Partner data standards and HMIS regulations.	Yes	No
The proposed HMIS will safeguard security and privacy by ensuring that user access levels are restricted based on user role and/or permissions that are enforced consistently throughout the software solution.	Yes	No
The proposed HMIS will include audit functionality to track changes to client- and provider-level records in the database.	Yes	No
The proposed HMIS must be fully compatible for use on any Internet browser.	Yes	No
The proposed HMIS will support batch import and export of data from external databases, including a contractual commitment to support the latest XML and CSV schema defined by HUD.	Yes	No

The proposed HMIS will generate HUD-mandated reports, including the CoC Annual Performance Report (APR), HMIS APR, Emergency Solutions Grant (ESG) Consolidated Annual Performance and Evaluation Report (CAPER), Annual Homeless Assessment Report (AHAR), HUD System Performance Report, and Point-in-Time (PIT) report, Housing Inventory (HIC), and LSA as well as customized reports.	Yes	No
The proposed HMIS will support batch import and export of data from external databases, including a contractual commitment to support the latest XML and CSV schema defined by HUD.	Yes	No
The proposed HMIS will generate HUD-mandated reports, including the CoC Annual Performance Report (APR), HMIS APR, Emergency Solutions Grant (ESG) Consolidated Annual Performance and Evaluation Report (CAPER), Annual Homeless Assessment Report (AHAR), HUD System Performance Report, and Point-in-Time (PIT) report, Housing Inventory (HIC), CSBG, and LSA as well as customized reports.	Yes	No

Full Review

Scoring Rubric	Maximum Points
User Interface/Experience	10
Reporting	18
Customer Service	12
Standard Functionality	22
Additional Functionality	8
References	10
Demonstration Consistent with Proposal	20

Scoring Rubric

User Interface/Experience

Software has customizable workflow guidance that walks end-users through each step of the workflow process.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software has conditional logic to assist end users and decrease errors.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
End users can easily manage households before and during project enrollment.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software features modern website design principles to create a software that is easy to use and navigate.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software is device-adaptive and can be used on any wi-fi enabled device (i.e. tablets, smart phones, desktops, laptops, etc.)	Yes, included = 2 Yes, for an additional charge = 1 No = 0

Reporting

Software can generate standard reports required by HUD and other federal partners.	Yes, real time = 2 Yes, near real-time = 1 No = disqualifying
Software can create ad hoc reports.	Yes, real time = 2 Yes, near real-time = 1 No = disqualifying
Ad hoc reporting allows for the creation of custom variables.	Yes, real time = 2 Yes, near real-time = 1 No = disqualifying
Ad hoc reporting can perform simple functions (mathematical operations, length of time calculations, rankings, etc.).	Yes, real time = 2 Yes, near real-time = 1 No = disqualifying
Data quality reports offer client-level detail for resolving data quality issues.	Yes, real time = 2 Yes, near real-time = 1 No = disqualifying
Reports can aggregate results in exportable data visualizations.	Yes, real time = 2 No = 0
Standard and ad hoc reporting is compatible with modern browsers (Mozilla, Chrome, Microsoft Edge, etc.)	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Reports can be exported as excel files, csv files, and pdfs.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Reporting allows for the creation of coordinated entry by-name lists and priority lists.	Yes, included = 2 Yes, for an additional charge = 1 No = 0

Customer Service and Support

What is your average response time for support tickets received from customers?	Within the hour = 3 Within 24 hours = 2 Within 24-48 hours = 1 Longer than 48 hours = 0
How often do you collect customer feedback?	After every trouble ticket/interaction = 2 Monthly = 1 Less frequently than monthly = 0
How often do you review end-user feedback regarding your customer services?	At least monthly = 3 At least quarterly = 2 At least annually = 1 None of the above = 0
Are customers assigned a designated contact person for all things related to their contract with your company?	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Provides updated technical and user documentation.	Yes, included = 2 Yes, for an additional charge = 1 No = 0

Standard Functionality

Software features user roles which system administrators can use to control data access and security.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software has features to prevent the creation of duplicate client records.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software has limited unplanned downtime and is readily available for users.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
System will automatically log users out after a period of inactivity.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
System will lock user accounts after a series of unsuccessful log in attempts.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software allows for the merging of duplicate client records.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software accepts document uploads into client records.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software can track used and available beds/units.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software features a resource guide for end-users to search for services like AIRS Taxonomy.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software allows users to assess, make referrals, and accept referrals as part of a coordinated entry system.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Vendor provides a mirror site for user training.	Yes, included = 2 Yes, for an additional charge = 1 No = 0

Additional Functionality

Software can collect data for mapping (latitude and longitude, etc.).	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software can convert geospatial data into interactive maps.	Yes, included = 2 Yes, for an additional charge = 1 No = 0

Software allows clients to access a limited amount of their own data and make updates to contact information.	Yes, included = 2 Yes, for an additional charge = 1 No = 0
Software allows users to set up funds and track funds expended through the creation of services.	Yes, included = 2 Yes, for an additional charge = 1 No = 0

Proposal Conditions

Please give a concise overview of any contract terminations, litigation, censure by professional certifying authorities, or other formal actions taken against the vendor organization regarding contract disputes or non-compliance. If there have been no such incidents, please indicate so.