**Bidder Response Format and Forms**

**One (1) original and four (4) copies** of the Bidder’s proposal must be submitted **by 3:00 p.m., E.S.T., Friday, November 20, 2020 (postmarked)** to:

Community Shelter Board

Attention: Lianna Barbu

355 East Campus View Blvd., Suite 250

Columbus, Ohio 43235

All proposals must contain the wording: **Proposal Response –** **HMIS Solution** on the outside of the package.

Proposals received after the deadline will not be accepted. Proposals may not be delivered via email or facsimile.

**Additionally, Bidders must send one electronic copy of the complete Bidder proposal response, including the completed specification worksheets that have been provided here, by the same deadline above, to** [**lbarbu@csb.org**](mailto:lbarbu@csb.org)**.**

# Proposal Response Format

Bidders should consult the following format in developing and formatting their proposal response. The proposal should include a Table of Contents:

| **Section** | **Contents** |
| --- | --- |
| 3.1 Executive Summary | This part of the response to the RFP should be limited to a brief narrative not to exceed two (2) pages, describing the proposed solution. Please indicate if your organization is an implementer or reseller of HMIS solutions and indicate which product suite is being proposed. The summary should contain as little technical jargon as possible, and should be oriented toward non-technical personnel. The Executive Summary should not include cost quotations |
| Organization Background | The Bidder is required to provide a general description of the application program product(s) and must provide information about their company so that CSB can evaluate the Bidder's stability and ability to support the commitments set forth in response to the RFP. CSB, at its option, may require the Bidder to provide additional documentation to support and/or clarify requested information. If the Bidder is proposing to use a subcontractor on this project, please provide background information on the subcontractor, Bidder relationship with that firm and the specific services and/or products that the subcontractor will be providing on the project. A complete list of subcontractors is required. CSB has the right to approve or disapprove of all subcontractors of the Bidder at any time. |
| Proposed Applications Solution | The Bidder is required to provide a general description of the application program product(s) and how it will meet requirements of this RFP. For each product included, please describe the software manufacturer and product version. |
| Questionnaire | The Bidder must respond to the Bidder Questionnaire in Section 5.3 of this RFP. Please complete one Questionnaire form for each company / firm represented in the Bidder’s proposed solution. Please indicate the prime Bidder for only one organization. |
| Services Implementation Work-plan | It is expected that the successful Vendor(s) will lead the efforts in each of the implementation areas described unless stated otherwise. CSB expects that an initial step in the implementation will be to more clearly define a detailed implementation plan and schedule. The Bidder is to provide a preliminary implementation plan in narrative format supported by an activity-level project plan that details how the proposed solution is to be implemented, including the following components:   1. Project Management Approach 2. Technical Environment Design / Planning 3. Hardware and Software Installation 4. System and Operational Procedure Development 5. Data Conversion Plan / Execution 6. Report Development 7. Custom Programming / Software Modifications 8. Integrations and Interfaces 9. Training 10. System Documentation 11. HMIS Hosting   The Bidder should not be constrained to only include the identified items in the Bidder’s proposal response if the Bidder feels that they add value to the overall implementation. CSB requests that the Bidder should provide their work plan in a Gantt chart format as part of the proposal response. |
| On-Going Support and Maintenance | The Bidder must specify the nature, costs and conditions of any post-implementation support options including:   1. On-site support 2. On-line support 3. Telephone support - Include the minimum response time provided as part of the basic support agreement and average response time for the past twelve (12) months. 4. Remote diagnostics 5. Delivery method of future upgrades and product enhancements. 6. Hardware and database 7. Frequency of upgrades 8. Availability of user groups 9. Escalation options and procedures   Identify the party or business unit that is responsible for the support options provided above. Please provide any service level agreements (SLA’s). |
| Response to HMIS System specifications | Responses to the HMIS system specifications listed in Section 4 of this RFP must be provided in this section of the Bidder response. Use the pages provided and attach added explanation pages as necessary. The following code should be used when responding to the requirements:   |  |  | | --- | --- | | **Response** | **Description** | | Y | ***Yes***, the specification is available as a standard feature or configurable option of the packaged system included in the proposed solution | | R | If specification / report is available through developing a customized ***Report*** via the proposed report writer related to the software | | M | If specification is available through ***Modification*** to the system | | F | If specification is not available now, but will be available (general release) in a ***Future*** release of the software within 1 year of the date of the Bidder’s proposal. | | N | If specification is ***Not*** available |   Bidder proposal responses must include an electronic Excel copy of this section as well. |
| Client References | The Bidder must provide at least four (4) references from clients that are similar in size and complexity to CSB and the Columbus and Franklin County Continuum of Care. The format for completing the Bidder references is provided in Section 5.2 of this document. |
| License, Support and Maintenance Agreements | Sample license and maintenance agreements must be provided in this part of the Bidder’s response for all components of the recommended solution (i.e., hardware, software, operating system, database, etc.). Indicate the basis of how licenses are determined. Please provide Bidder’s standard form of contract. |
| Contract Terms and Conditions | Bidders are to refer to Section 6 and complete the following forms:   * Contract Terms and Conditions Compliance Checklist (Section 5.5) * Contract Terms and Conditions Compliance Checklist – Exceptions Explanations (Section 5.6)   Bidders are to check (provide an “X”) either the Comply, Exception, or Not Comply column to indicate their agreement with the Contract Terms and Conditions delineated in Section 6. |
| Exceptions and Deviations | If the Bidder finds it impossible or impractical to adhere to any portion of these specifications and all Appendices, it shall so state in its proposal, with all deviations grouped together in a separate section entitled, “Exceptions/Deviations from Proposal Requirements.” This section will be all inclusive and will contain a definition statement of each and every objection or deviation with adherence to specific RFP sections. Objections or deviations expressed only in other parts of the proposal, either directly or by implication, will not be accepted as deviations, and the Bidder in submitting a proposal, will accept this stipulation without recourse. |
| Sample Implementation Plan | Section 3.6 of the Bidder’s proposal response should include a “Services Implementation Work-plan” for CSB. In addition, the Bidder should provide in this section, a sample Implementation Plan from a successfully implemented HMIS system for a client of the Bidder. |
| Other Information | Please provide any other information that supports your proposal in this section. |
| Bidder Pricing | Costs for the Bidder’s proposed solution should be submitted on Bidder Pricing Forms provided in Section 5.4 of this RFP. Costs should include the complete costs for the solution including software, license fees, training, travel, per diem, installation, documentation, discounts, operating costs, etc. Use additional pages as needed to provide additional cost detail, however all costs should be completely reflected on the Proposal Pricing Forms. For each item, indicate if the cost is one-time, annual, or other. In the event the product or service is provided at no additional cost, the item should be noted as "no charge" or words to that effect. In the event the product or service is not being included in the Bidder proposal, the item should be noted as "No Bid".  ***If a Bidder is proposing multiple licensing options (i.e. enterprise and named user) please provide a complete copy of the pricing forms for each option, clearly labeled as such.*** |
| Signature Page | Please attach a completed copy of the Signature Page, provided in Section 5.1 of this RFP, signed by an individual that is authorized to sign on behalf of company submitting the proposal. |

# HMIS System Specifications

CSB has included in this section the following application specifications categories for the proposed HMIS system:

4.1 - General Requirements

4.2 - System Security & Privacy

4.3 - Data Collection

4.4 - Client Services

4.5 - Quality Assurance

4.6 - Reporting

4.7 - Local Administration

CSB believes that the majority of the requirements identified for these applications can be met by packaged software products with a minimum number of software modifications. Each Bidder should review the specifications and reports listed in each subsection and respond as to their availability within the Bidder’s proposed software system.

Several Prioritycolumns have been included to describe the level of importance of each specification to CSB:

|  |  |
| --- | --- |
| **Priority** | **Importance** |
| HUD Required | Requirement established by HUD to comply with current HMIS Data & Technical Standards |
| Locally Required | Software Requirement Established by CSB |
| Desired | Desired Software Specification |

Each Bidder should review the specifications listed in each category and respond as to their availability within the Bidder’s software system. The responses should be entered under the “Availability**”** column of each form as follows:

|  |  |
| --- | --- |
| **Availability** | **Description** |
| Y | If specification is available as a standard feature or configurable option of the packaged system included in the proposed solution |
| R | If specification / report is available through developing a customized report via the proposed reporting software |
| M | If specification is available through modification to the system |
| F | If specification is not available now, but will be available (general release) in a future release of the software **within 1 year of the date of the Bidder’s proposal.** |
| N | If specification is not available |

Do not change the order or language of the specifications.

Bidders must enter their “Availabilities” (i.e., Y, R, M, F, or N) for all specifications on the Word form and provide them electronically with their proposal.

Use the Costcolumn for “M” or “F” responses to estimate the cost to be incurred by CSB to secure the specification/report. If the response is “F” CSB asks that future upgrades and system enhancements are at no cost for CSB and its agencies.

## General requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **Feature** | **Priority** | **Availability** | **Cost** (if not included in bid) |
| Commitment to regularly update product as technology improves | Locally required |  |  |
| Commitment to annual updates in compliance with updated HUD requirements | HUD required |  |  |
| Documented procedures on how updates will be processed (i.e. opt-in or mandatory; time of day updates are pushed; etc.) | Locally required |  |  |
| Protocol for addressing bug reports | Locally required |  |  |
| Use of a train the trainer model as part of installation process | Locally required |  |  |
| Commitment to ongoing technical support | Locally required |  |  |
| Openness to feedback and feature requests | Desired |  |  |
| Built-in ticket system | Desired |  |  |
| Self-service password updates | Locally required |  |  |
| Ability to handle dozens of concurrent users | Locally required |  |  |
| Built-in data elements/assessments/workflows are well documented in a data dictionary or user guide | Locally required |  |  |
| Consistency in product design from one screen to another | Desired |  |  |
| Ability to use software from a tablet or smartphone in addition to desktop computers (i.e. includes a mobile-friendly interface) | Locally required |  |  |
| Printer friendly interface when in desktop mode | Desired |  |  |
| Ability to quickly view a client’s entire history (assuming appropriate user permission) | Locally required |  |  |
| Software updates are thoroughly tested or made available as a preview before being pushed out | Locally required |  |  |
| Built-in help (e.g. hover over text) for end users | Desired |  |  |
| Thorough data dictionary explaining the purpose of built-in data elements | Desired |  |  |

## SYSTEM Security & Privacy

|  |  |  |  |
| --- | --- | --- | --- |
| **Feature** | **Priority** | **Availability** | **Cost** (if not included in bid) |
| Web-based data hosting and security | Locally required |  |  |
| Documented nightly backup and emergency recovery procedures, managed by vendor | Locally required |  |  |
| Secure API capability | Desired |  |  |
| Technological safeguards including authentication, encryption, and role-based data access | HUD required |  |  |
| Ability to audit user activity by user or by client | Locally required |  |  |
| Ability to lock users out of the system on demand | Locally required |  |  |
| Ability to control password requirements | Desired |  |  |
| Availability of two-factor authentication | Desired |  |  |
| System timeout after 15 minutes of inactivity | HUD required |  |  |
| User limited to one simultaneous login | HUD required |  |  |

## DATA COLLECTION

|  |  |  |  |
| --- | --- | --- | --- |
| **Feature** | **Priority** | **Availability** | **Cost** (if not included in bid) |
| Built-in support for all HUD-required data elements (universal data elements, project descriptor elements, program specific data elements, metadata elements) | HUD Required |  |  |
| Client intake – intuitive workflow to minimize data entry errors | Locally Required |  |  |
| Client updates – ability to see a data element’s history and change data/correct errors with minimal steps | Locally Required |  |  |
| Ability for case workers to track clients | Desired |  |  |
| File uploading and storage capabilities | Locally Required |  |  |
| Ability to share or hide data on a per program basis (I.e. some agencies should have records only they can see) | HUD Required |  |  |
| Ability to track service records (e.g. financial assistance) separate from entry-exit records | Locally Required |  |  |
| Real time alerts for probable errors (e.g. a client who is employed but doesn’t have any earned income) | Desired |  |  |
| Auto population of data from previous program enrollments when appropriate | Locally required |  |  |
| Ability to track client release of information (ROI) or to turn off functionality | Desired |  |  |
| Ability to collect electronic signatures | Desired |  |  |
| Ability to attach (and display) a photo of the client to their profile | Desired |  |  |
| Case note management system (I.e. more than a textbox for notes) – preferably with search function | Desired |  |  |
| Bed list/waiting list functionality that is distinct from program entry-exit records | Locally required |  |  |

## CLIENT SERVICES

|  |  |  |  |
| --- | --- | --- | --- |
| **Feature** | **Priority** | **Availability** | **Cost** (if not included in bid) |
| Ability to identify client eligibility or flag ineligibility for a given program (e.g. clients needing a disability to enter PSH) | Desired |  |  |
| Ability to create anonymous records – should be available only to select users | HUD Required |  |  |
| Ability to create and manage households to track families as units | Locally required |  |  |
| Ability for case managers to easily see a summary of their current clients | Desired |  |  |

## QUALITY ASSURANCE

|  |  |  |  |
| --- | --- | --- | --- |
| **Feature** | **Priority** | **Availability** | **Cost** (if not included in bid) |
| Safeguards to prevent creation of duplicate clients | Locally Required |  |  |
| System alerts for annual assessment due dates | Desired |  |  |
| System alerts for clients turning 18 or having other eligibility related data updated | Desired |  |  |
| Confirmation of sensitive actions (e.g. deleting records) | Locally Required |  |  |
| Ability to merge duplicate client records | Locally Required |  |  |
| Safeguards to prevent common data entry mistakes (e.g. preventing a “yes” answer to client is receiving income with no type specified) | Desired |  |  |

## REPORTING

|  |  |  |  |
| --- | --- | --- | --- |
| **Feature** | **Priority** | **Availability** | **Cost** (if not included in bid) |
| Ability to run all HUD mandated reports on demand without programming by CSB | HUD required |  |  |
| Ability to create custom reports on demand in a modern reporting tool with data visualization | Locally Required |  |  |
| Ability to export large amounts of raw data on demand | Locally Required |  |  |
| Availability of all locally created data elements in the reporting software | Locally Required |  |  |
| Ability to pull real time data in reports | Desired |  |  |
| Ability to export report data to MS Excel, CSV or XML | Locally Required |  |  |
| Availability of reporting for select end users | Locally Required |  |  |
| Ability to schedule reports | Desired |  |  |
| Availability of client level data in federal reports | Desired |  |  |
| System capability to handle high amounts of data at once, or a procedure to run such reports on vendors’ end when needed | Locally Required |  |  |
| Thorough system documentation (if reporting tool is not a commonly used out-of-box product) | Desired |  |  |
| Ability to pull all system data or to request such data from the vendor once a month | Desired |  |  |
| Ability to print custom reports directly from HMIS | Desired |  |  |
| All data including custom data elements (with exclusion of deleted/corrected answers and audit history) is available in the reporting tool | Locally required |  |  |

## LOCAL Administration

|  |  |  |  |
| --- | --- | --- | --- |
| **Feature** | **Priority** | **Availability** | **Cost** (if not included in bid) |
| Ability to create and modify client assessments/ data intake forms/workflows | Locally Required |  |  |
| Ability to add custom data elements | Locally Required |  |  |
| Ability to use conditional logic on data forms | Desired |  |  |
| Ability to track real time reservation and bed availability | Locally Required |  |  |
| Scoring system to allow prioritization of clients | Desired |  |  |
| Ability to create and modify program on demand | Locally Required |  |  |
| Ability to create and manage custom user roles | Desired |  |  |
| Ability to push notifications to end users (e.g. news) | Desired |  |  |
| Ability to shadow end users to facilitate troubleshooting | Locally required |  |  |
| Ability to email updates to selected end users | Desired |  |  |
| Availability of a (clearly distinguishable) training site | Locally required |  |  |
| Ability to show different home screens/different workflows for a user role and agency level (or individual user level) | Desired |  |  |
| Ability to close all clients open in a specific program as of a specific date (i.e. in the event a project closes) | Desired |  |  |

# Signature Page

The following is a form to be completed by the Bidder(s) to propose hardware, software, and services for the Homeless Management Information System described in this RFP:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature Company Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name Company Address

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title City St. Zip

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Telephone # Fax #

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Federal Tax ID # Email Address

**The above individual is authorized to sign on behalf of the company submitting the proposal.**

Proposals must be signed by an official authorized to bind the provider to its provisions for at least a period of 180 days.

## Bidder Reference Information

Please provide reference information for four installations similar in size and complexity to the CSB’s.

|  |  |
| --- | --- |
| Customer Name: |  |
| Customer Contact: |  |
| Customer Phone Number: | ( ) |
| E-mail Address: |  |

|  |
| --- |
| Equipment configuration (briefly describe each system device quantities, and list characteristics such as size, speed, and capacity): |
|  |

|  |
| --- |
| Installed application systems (briefly describe): |
|  |

## Bidder Questionnaire

1. Please state the year the Bidder started in the business of selling Homeless Management Information System solutions?

|  |
| --- |
| **Year Started Selling HMIS** |
|  |

1. Please state the year the Bidder started in the business of selling and implementing the specific Homeless Management Information System that has been proposed to CSB?

|  |
| --- |
| **Year Started Implementing This Specific System** |
|  |

1. Does the Bidder develop and implement the HMIS solution or is the Bidder a reseller, integrator and implementer of a product(s)? (please check one)

|  |  |
| --- | --- |
| **Developer and Implementer** | **Implementer / Integrator** |
|  |  |

If the Bidder is a reseller, integrator and implementer of a product(s), please list the products and their manufacturers / developers:

|  |
| --- |
| **Primary Product Components** |
|  |

1. Where is the Bidder’s closest support facility from which the Bidder would provide primary support?

|  |
| --- |
| **Support Facility Location** |
|  |

1. Where is the Bidder’s company headquarters?

|  |
| --- |
| **Company Headquarters Location** |
|  |

1. Please list the Bidder’s sales in the previous four years (complete each column as appropriate):

|  |  |  |
| --- | --- | --- |
| **Year** | **Sales for Product Manufacturer** | **Sales for VAR / Implementer** |
| 2019 |  |  |
| 2018 |  |  |
| 2017 |  |  |
| 2016 |  |  |

1. How many total full time equivalent (FTE) employees does the Bidder have in each of the following categories, dedicated to the HMIS implementation (complete each column as appropriate):

|  |  |  |
| --- | --- | --- |
| **Area** | **Number for Product Bidder** | **Number for VAR / Implementer** |
| Sales/Marketing |  |  |
| Management/Administration |  |  |
| Help Desk Staff |  |  |
| Implementation Staff |  |  |
| Development Staff |  |  |
| Report development staff (if in addition to the above) |  |  |
| Other |  |  |
| Total |  |  |

1. What is the Bidder’s hourly rate for implementation assistance *beyond* that which is included in the Bidder bid by skill-set?

|  |  |
| --- | --- |
| **Rates for Additional Implementation Assistance** | |
| **Hourly Rate** | **Skill Set** |
| $ / hr | Project Management |
| $ / hr | Custom Reporting |
| $ / hr | System Interface / Integration Development |
| $ / hr | Customization / Programming |
| $ / hr | Data Conversion |
| $ / hr | Technical Training |
| $ / hr | End User Training |
| $ / hr | Documentation Development |
| $ / hr | Other – please describe |
| $ / hr |  |
| $ / hr |  |

1. As a *Primary* Bidder, can the Bidder provide a true Turnkey Solution, including:

| **Turnkey Solution** | | |
| --- | --- | --- |
| **Component** | **Yes** | **No** |
| HMIS Software |  |  |
| Reporting Software |  |  |
| Other Ancillary Software |  |  |
| Server Hardware (if needed) |  |  |
| HMIS Hosting |  |  |
| Network Infrastructure / Technical Planning |  |  |
| User Training |  |  |
| Technical Training and Knowledge Transfer |  |  |
| Data Conversion |  |  |
| Development of Integrations and Interfaces |  |  |
| Ongoing Support |  |  |
| Project Management |  |  |

Please describe any responses above where the Bidder does not provide a turnkey solution:

|  |
| --- |
| **Description** |
|  |

1. How long has the current version of the proposed software been in production?

|  |
| --- |
| **Duration** |
|  |

1. Will the Bidder provide all periodic enhancements to the software at no additional charge, beyond the annual support agreement?

|  |  |
| --- | --- |
| **Yes** | **No** |
|  |  |

Please describe the frequency of major and minor releases

|  |
| --- |
| **Release Schedule** |
|  |

1. CSB requests that the successful Vendor agree to a one-year warranty. The warranty period would start on the day of final approval for payment, after the system is installed and functioning properly, and after the Vendor’s authorized representative and consultants have tested and approved the system. Will the Bidder agree with this condition? (please check one)

|  |  |
| --- | --- |
| **Yes** | **No** |
|  |  |

If the Bidder does not agree, what is the longest time that the Bidder would agree to an “on-site” warranty?

|  |
| --- |
| **Duration** |
|  |

1. Does the Bidder have a toll-free support line? (if Yes, please describe it)

|  |  |
| --- | --- |
| **Yes** | **No** |
|  |  |

|  |
| --- |
| **Description** |
|  |

1. Does the Bidder have an online customer support center that provides support resources? (if Yes, please describe it)

|  |  |
| --- | --- |
| **Yes** | **No** |
|  |  |

|  |
| --- |
| **Description** |
|  |

1. Does the Bidder have an online customer support center that provides the ability for CSB to log a service ticket requesting support? (if Yes, please describe it)

|  |  |
| --- | --- |
| **Yes** | **No** |
|  |  |

|  |
| --- |
| **Description** |
|  |

1. What is the Bidder’s average response time (hours) for a response to a service ticket (phone or online)?

|  |
| --- |
| **Average Online Service Ticket Response Time** |
|  |

1. What is the Bidder’s guaranteed maximum response time (hours) for a response to a service ticket (phone or online)?

|  |
| --- |
| **Maximum Guaranteed Online Service Ticket Response Time** |
|  |

1. Can you remotely access installed systems to perform diagnostics? (please describe approach)

|  |
| --- |
| **Remote Access / Diagnostics Approach** |
|  |

1. How many fully operational installations has the Bidder completed as follows:

|  |  |  |
| --- | --- | --- |
| **Location** | **Midwest States** | **Nationally** |
| Multi-organization (i.e. Continuum of Care) |  |  |
| Single organization |  |  |
| Overall |  |  |

1. Please describe the Bidder’s commitment to providing HMIS solutions in the future?

|  |
| --- |
| **Commitment to Provide HMIS Solutions in the Future** |
|  |

1. Will the Bidder contractually agree to:

|  |  |  |
| --- | --- | --- |
| **Contractual Inquiry** | | |
| **Term / Condition** | **Yes** | **No** |
| Provide on-site staff for training and implementation at CSB? |  |  |
| Hold-backs of payments for non-performance? |  |  |
| Payment hold-backs until fully operational and formally accepted? |  |  |
| Designation of a Project Manager assigned to CSB? |  |  |
| Allow CSB to approve Vendor staff assigned to help with implementation? |  |  |

1. Ranked in order, what would be the Bidder’s three top preferred, comparably sized, site visit locations?

|  |
| --- |
| **Bidder Preferred, Comparably Sized, Site Visit Location** |
|  |

1. What hardware platform does the Bidder’s proposed application software currently operate on?

|  |
| --- |
| **Hardware Platform of Proposed Applications** |
|  |

1. What operating system(s) does the Bidder’s proposed application software currently operate on?

|  |
| --- |
| **Operating System of Proposed Applications** |
|  |

1. What database environment does the Bidder’s proposed application software currently operate on?

|  |
| --- |
| **Database Environment of Proposed Applications** |
|  |

1. Is the Bidder committed to supporting the above operating system, database and hardware platform(s) for the foreseeable future?

|  |  |
| --- | --- |
| **Yes** | **No** |
|  |  |

1. Will the Bidder guarantee that the system will maintain a 5-second maximum response time under all circumstances?

|  |  |
| --- | --- |
| **Yes** | **No** |
|  |  |

1. Will the Bidder guarantee that the system will operate at least 98% of the time?

|  |  |
| --- | --- |
| **Yes** | **No** |
|  |  |

1. Please describe the Bidders standard contract billing terms and practices, including initial and ongoing time frames. Please minimally specify terms and practices for license components, services, ongoing support and maintenance agreements.

|  |
| --- |
| **Billing Terms** |
|  |

1. Please describe the Bidder’s standard HMIS software license tier levels (i.e. 5 user blocks, single users, etc.) and describe the nature of how incremental licenses are added. Please include incremental pricing information.

|  |
| --- |
| **HMIS Software User License Tiers** |
|  |

1. CSB purchasing policy dictates that the successful Vendor(s) are to provide a valid registered Tax Identification Number. Please provide.

|  |
| --- |
| **Bidder’s Tax-ID** |
|  |

1. Has your organization had experience converting data from ServicePoint 5? Please describe any relevant experience.

|  |
| --- |
| **Relevant Experience** |
|  |

1. Please describe your organizations availability to begin implementation of an HMIS solution for CSB.

|  |
| --- |
| **Availability** |
|  |

1. Please describe how system customizations and modifications will affect future enhancements and upgrades.

|  |
| --- |
| **Effects on future enhancements and upgrades** |
|  |

## Bidder Pricing Forms

Please complete the attached pricing forms:

**A. HMIS Application Software**

Please include pricing below for all necessary HMIS application software and related licensing required to accommodate the proposed HMIS solution as delineated in the requirements defined within this RFP: Please categorize your expenditures in the appropriate column. Add additional lines with explanation as needed. Rightmost “Total” column and “Annual Ongoing Support Cost” should reflect CSB’s total one-time cost and total recurring costs, respectively. License costs in Bidder proposals should minimally be quoted by Bidder for enterprise licensing. Bidders are welcome to additionally optionally propose a seat based or workstation-based licensing model. ***If a Bidder is proposing multiple licensing options (i.e. enterprise and named user) please provide a complete copy of the pricing forms for each option, clearly labeled as such.***

| **A. HMIS Application Software** | **Item Description** | **Set-up** | **# of Units (i.e. licenses) / Unit Cost** | **Total (one-time cost)** | **Annual Ongoing Support Cost** |
| --- | --- | --- | --- | --- | --- |
| Please describe |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| **Sub-Total: Proposed Application Software Cost** |  |  |  |  |  |

**B. Other Required Software**

Please include pricing below for all other software and related licensing required to accommodate the proposed HMIS solution as delineated in the requirements defined within this RFP: Please categorize your expenditures in the appropriate column. Rightmost “Total” column and “Annual Ongoing Support Cost” should reflect CSB’s total one-time cost and total recurring costs, respectively.

| **B. Other Required Software** | **Item Description** | **Set-up** | **# of Units (i.e. licenses) / Unit Cost** | **Total (one-time cost)** | **Annual Ongoing Support Cost** |
| --- | --- | --- | --- | --- | --- |
| Utilities |  |  |  |  |  |
| Relational Database Software |  |  |  |  |  |
| Operating System Software |  |  |  |  |  |
| Reporting Software |  |  |  |  |  |
| Virus Protection |  |  |  |  |  |
| Software Required for Participating HMIS Agencies |  |  |  |  |  |
| Other – Please describe |  |  |  |  |  |
|  |  |  |  |  |  |
| **Sub-Total: Proposed Other Software Cost** |  |  |  |  |  |

**C. Hardware**

The general assumption is that no hardware costs are necessary, however, please include pricing below if this is necessary to support the Bidder’s proposed HMIS solution as defined within this RFP: Please categorize your expenditures in the appropriate column. Rightmost “Total” column and “Annual Ongoing Support Cost” should reflect CSB’s total one-time cost and total recurring costs, respectively.

| **C. Hardware** | **Item Description** | **Set-up** | **# of Units / Unit Cost** | **Total (one-time cost)** | **Annual Ongoing Support Cost** |
| --- | --- | --- | --- | --- | --- |
| Application Server |  |  |  |  |  |
| Database Server |  |  |  |  |  |
| Security Hardware |  |  |  |  |  |
| Hardware Required for Participating HMIS Agencies |  |  |  |  |  |
| Other – please describe |  |  |  |  |  |
|  |  |  |  |  |  |
| **Sub-Total: Proposed Hardware Cost** |  |  |  |  |  |

**D. Implementation and Ongoing Services**

Please include pricing below for implementation and ongoing services defined within this RFP: Please categorize your expenditures in the appropriate column. Rightmost “Total” column and “Annual Ongoing Support Cost” should reflect CSB’s total one-time cost and total recurring costs, respectively.

| **D. Implementation Services** | **Item Description** | **# of Units (hours)** | **Unit Cost (hourly rate)** | **Total (one-time cost)** | **Annual Ongoing Support Cost** |
| --- | --- | --- | --- | --- | --- |
| Project Management Approach |  |  |  |  |  |
| Technical Environment Design / Planning |  |  |  |  |  |
| Hardware and Software Installation |  |  |  |  |  |
| System and Operational Procedure Development |  |  |  |  |  |
| Data Conversion Plan / Execution |  |  |  |  |  |
| Report Development |  |  |  |  |  |
| Custom Programming / Software Modifications |  |  |  |  |  |
| Integrations and Interfaces |  |  |  |  |  |
| Technical Training |  |  |  |  |  |
| Local Agency / HMIS Administrator Training |  |  |  |  |  |
| End User Training / Training Materials |  |  |  |  |  |
| System Documentation |  |  |  |  |  |
| HMIS Hosting |  |  |  |  |  |
| Other – please describe |  |  |  |  |  |
|  |  |  |  |  |  |
| **Sub-Total: Proposed Implementation Services Cost** |  |  |  |  |  |

**E. Other Services**

Please include pricing below for other necessary services required to support the Bidder’s proposed HMIS solution as defined within this RFP: Please categorize your expenditures in the appropriate column. Rightmost “Total” column and “Annual Ongoing Support Cost” should reflect CSB’s total one-time cost and total recurring costs, respectively.

| **E. Other Services** | **Item Description** | **# of Units (hours)** | **Unit Cost (hourly rate)** | **Total (one-time cost)** | **Annual Ongoing Support Cost** |
| --- | --- | --- | --- | --- | --- |
| Hosting Services |  |  |  |  |  |
| Disaster Recovery |  |  |  |  |  |
| Technical Assistance |  |  |  |  |  |
| Software Support / Maintenance |  |  |  |  |  |
| Hardware Support / Maintenance |  |  |  |  |  |
| Onsite support |  |  |  |  |  |
| Upgrades |  |  |  |  |  |
| Travel |  |  |  |  |  |
| Other – please describe |  |  |  |  |  |
|  |  |  |  |  |  |
| **Sub-Total: Proposed Other Services Cost** |  |  |  |  |  |

**F. Other Costs**

Please include pricing below for any other necessary components required to support the Bidder’s proposed HMIS solution as defined within this RFP: Please categorize your expenditures in the appropriate column. Rightmost “Total” column and “Annual Ongoing Support Cost” should reflect CSB’s total one-time cost and total recurring costs, respectively.

| **F. Other Costs** | **Item Description** | **# of Units** | **Unit Cost** | **Total (one-time cost)** | **Annual Ongoing Support Cost** |
| --- | --- | --- | --- | --- | --- |
| Other – please describe |  |  |  |  |  |
|  |  |  |  |  |  |
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|  |  |  |  |  |  |
|  |  |  |  |  |  |
| **Sub-Total: Proposed Other Cost** |  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **SECTION TOTALS** | | |
| **Section** | **Total One-Time Cost** | **Total Annual Ongoing Support Costs** |
| A. HMIS Application Software |  |  |
| B. Other Required Software |  |  |
| C. Hardware |  |  |
| D. Implementation Services |  |  |
| E. Other Services |  |  |
| F. Other Costs |  |  |
| Less: Discount Offered |  |  |
| **GRAND TOTAL**: |  |  |

## Contract Terms and Conditions Compliance Checklist

Bidders are to mark either the Comply, Exception, or Not Comply column to indicate their agreement with the terms and conditions delineated in Section 6. Comply indicates the Bidder understands and agrees to comply fully. Exceptions must be fully explained on the Exception Explanations page. CSB reserves the right to reject any proposal for non-compliance with one or more of the specifications. The terms and conditions provided in Section 6 are subject to negotiation and change after the successful Vendor is selected.

| **Contract Terms and Conditions Compliance Checklist** | | | | |
| --- | --- | --- | --- | --- |
| **#** | **Title** | **Comply** | **Exception** | **Not Comply** |
|  | Scope of Services |  |  |  |
|  | Term |  |  |  |
|  | Personnel |  |  |  |
|  | Indemnification |  |  |  |
|  | Insurance Requirements |  |  |  |
|  | Compliance with Laws and Regulations |  |  |  |
|  | Nondiscrimination Clause |  |  |  |
|  | Assignment and Successors |  |  |  |
|  | Termination of Contract |  |  |  |
|  | Payroll Taxes |  |  |  |
|  | Changes in Scope or Schedule of Services |  |  |  |
|  | Choice of Law and Forum |  |  |  |
|  | Incorporation by Reference |  |  |  |
|  | Risk During Storage and Installation |  |  |  |
|  | Shipping of Equipment and Software |  |  |  |
|  | Effect of Regulation |  |  |  |
|  | Control of Sub-Contractor, Project Team and Project Manager Designation |  |  |  |
|  | Warranty of Solution |  |  |  |
|  | Warranties |  |  |  |
|  | Resolution and Response Time Warranty |  |  |  |
|  | Final Acceptance of the System |  |  |  |
|  | Notices Clause |  |  |  |
|  | Force Majeure Clause |  |  |  |
|  | Annual Support Fees |  |  |  |
|  | Video Taping |  |  |  |
|  | Major Releases / Upgrades |  |  |  |
|  | Solution Longevity |  |  |  |
|  | Successor Software Products |  |  |  |
|  | License in Bankruptcy |  |  |  |
|  | Waivers; Severability |  |  |  |

## Contract Terms and Conditions Compliance Checklist – Exception Explanations

For all items marked as “Exception” in the Contract Terms and Conditions Compliance Checklist, a Bidder must fully explain the exception on the Exception Explanations form below.

|  |  |  |
| --- | --- | --- |
| **Exception Explanations** | | |
| **#** | **Title** | **Explanation of Exception** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |