

# Community Shelter Board HMIS RFP Clarifications

The Community Shelter Board received the following questions in response to our request for proposal for a homeless management information system issued on October 5. A few similar questions received from different vendors were combined into one question. Our responses are below each question.

**1) How many agencies will be participating?**

- CSB currently works with 16 partner agencies that have access to HMIS. This number might expand slightly in the future.

**2) How many total users will you have?**

- We have 356 user licenses available to use.

**3) Of the total users, how many General End Users (e.g. case managers) will there be? A General end user will have access to system core functionality, and can perform case/client management, program enrollments, service provision. They can also manage referrals and pulled canned reports (as determined by their assigned access role). Please also provide a breakdown on partner agency/CSB staff for this role.**

- We currently have 276 people with access to case manager functions, of which 9 are CSB staff. An additional 2 users have read-only access.

**4) Of the total users, how many Agency Managers will there be? An Agency Manager will be able to do everything an End User can. They can also configure and manage all elements of agency operations, such as staff profiles, programs, services, and funding.**

- We currently have 34 people with access to agency administrator functions. These are all partner agency staff.

**5) Of the total users, how Many System Administrators will there be? System Administrator users will be able to do everything a Manager and End User can. They also can customize all aspects of the system, including the creation of screens, fields, assessments, and access roles.**

- We currently have 7 people with access to the system administrator role. These are all CSB staff.

**6) Of the total users, how many of your total users will need to do data analysis/make custom reports?**

- All system administrators and agency administrators (40 users) need to ability to run custom reports. Only about 10 people need the ability to modify/create new reports. Ideally, we would be able to give reporting ability to non-admin users as needed.

**7) Will you need to migrate data from your current system? If you need to migrate data, will you be migrating HUD data and custom data, or just HUD data?**

- Yes, we will need to migrate both HUD and custom data elements.

**8) Is there a budget for this project?**

- CSB will use the selection criteria described in the RFP to identify the best HMIS implementation for our community.

**9) Is the electronic version of the RFP to be submitted on a thumb drive along with the printed RFP response documents? Or shall we email you this copy? If so, to what address do we email the electronic copy to?**

- One (1) original and four (4) copies of the Bidder's proposal must be submitted by mail. The electronic version of the RFP Bidder Response Form should be emailed to lbarbu@csb.org

**10) CSB has provided extensive and very detailed pricing templates for vendors to complete. We understand that CSB is asking for full transparency for absolutely any cost that CSB might incur should a contract be established, but we do not price our software and services by the same criteria and categories provided in the charts. Would CSB allow vendors to submit their comprehensive pricing in their own formats, in a way that best represents the way the software and services are priced?**

- We are asking bidders to follow the Bidder Response Form for pricing. CSB needs to be able to compare the cost for each solution proposed. Sections that don't apply can be skipped.

**11)(RFP 1.3 CSB Background) #18: The RFP mentions that CSB has its own security checklist that it uses for HMIS. Is this something that can be shared with bidders?**

- This refers to ensuring the HUD security standards are being implemented at CSB and partner agencies. The standards can be found in the follow document: <https://files.hudexchange.info/resources/documents/HMIS-Software-Vendor-Capacity-Checklist.pdf> and the "security" section of the following document: <https://files.hudexchange.info/resources/documents/HMIS-System-Administrator-Checklist.pdf>

**12)(RFP 1.5 Project Overview and Drivers) CSB mentions that its current system is "technologically dated." Can CSB explain further what they mean by that, and more importantly, how it is impacting their operations?**

- Our current HMIS software was written around 10 years ago with only minor updates since and has an unintuitive data entry experience. Logic checks on data accuracy are not built into the system's data entry process. This has led to unnecessary data errors.

The backend reporting system is no longer supported by the third-party vendor who developed it. The reporting tool also relies on an outdated version of Java which only works in Internet Explorer, creating a security risk.

**13)(RFP 1.5 Project Overview and Drivers) CSB mentions wanting a "more intuitive user interface." Is there a user interface that they feel is better? For example, have they seen one that they like?**

- CSB does not have preset expectations about the user interface as long as it is user friendly.

**14)(RFP 1.7 HMIS System Selection Schedule) To clarify, the expected migration and implementation timeline is four months (3/1/2021-6/30/2021) with a go-live date of July 1, 2021?**

- That is correct. CSB anticipates signing a contract with a new vendor by March 1, 2021, with a go-live date of July 1, 2021.

**15)(RFP section 1.8.5 and/or 1.10) Please expand on your data migration needs. Do you have an estimate of the amount of data in Gigabytes? Also, the number of tables, fields (columns), and records (rows) within those tables, to be migrated; file/data formats, and cleanliness of the data?**

- We do not have a way to quantify the size of data migration in gigabytes or the number of tables. We have approximately 460 data fields and 140,000 client records across all tables combined.

**16) (RFP Section 1.8.8 Integrations and Interfaces) Does CSB anticipate any integrations and interfaces to other systems – if the vendor does not require interfaces, as the system handles all things HMIS?**

- No, CSB does not have any third-party applications the software will need to interface with.

**17)(RFP Section 1.10) Is CBO and CHOs willing to switch to another browser besides Microsoft Explorer? Are there any browsers that would be a challenge?**

- Yes, we would prefer to use a modern browser. No major browser would present significant challenges.

**18)(RFP Section 2.2 Requirements for Signing Proposal) Due to the nature of COVID 19 – would authorized signatures be accepted via DocuSign/electronic signatures?**

- Yes

**19)(RFP Section 6.25 Video Recording/Taping) Could you clarify if a recording of training is desired, that it will be at the cost of CSB, and not at the cost of the vendor?**

- Yes, any recording would be done at CSB's expense.

**20)(Bidder Response Forms Section 4.1 General Requirements, box two. "Commitment to annual updates in compliance with updated HUD requirements") Please clarify your definition of "updates", i.e., are changes to HUD report requirements considered to be "updates" by CSB?**

- Yes, this item is intended to refer to changes to HUD's data/reporting requirements.

**21)(Bidder Response Forms 4.6 Reporting, box 2) Understanding that CSB desires the "Ability to create custom reports on demand in a modern reporting tool with data visualization", does CSB anticipate having the vendor assist in building these or any other custom reports? If yes, could you please provide details on the reporting requirements such as: example report formats, performance measures, KPI's, the need to export to other reporting systems (such as funders)?**

- CSB anticipates taking responsibility for creation of the bulk of our custom reports after an initial training on how to use the reporting software provided by the vendor. We may require help setting up some reports initially, depending on the complexity of the reporting system.

**22)(Bidder Response Forms 4.6 Reporting) Does CSB have any needs surrounding aggregate, duplicated/unduplicated, or individual record reporting?**

- No additional needs beyond HUD requirements. Yes, the reporting system needs to be able to report on both aggregated and deduplicated data. CSB has to have the option of downloading any and all raw data through the reporting system.

**23)(Bidder Response Forms, 5.3 Bidder Questionnaire, question 12) Could you please provide an explanation of the expectation and purpose of a one-year warranty?**

- We are expecting the successful bidder to take responsibility for the successful implementation of the HMIS solution.

**24)(Bidder Response Forms 5.3 Bidder Questionnaire, question 21) Given the current environment with COVID-19 and the inability to know what the environment may look like in 2021, does CSB still intend to have Bidder contractually agree to "Provide on-site staff for training and implementation at CSB?"**

- On-site training is desired because we doubt the effectiveness of training 100s of users via teleconference. For example, it is much easier for the end user to be distracted and not pay attention when viewing remotely than in-person. However, we understand this may not be possible due to COVID-19 and will consider reasonable requests for alternate plans.

**25)(Bidder Response Forms 5.3 Bidder Questionnaire, question 21) Could you please provide the background and reasoning for the desired on-site implementation?**

- CSB desires vendor staff to be on-site during the initial implementation to facilitate rapid trouble shooting of any problems that may arise. However, we understand this may not be possible due to COVID-19 and will consider reasonable requests for alternate plans.

**26)(Bidder Response Forms 5.3 Bidder Questionnaire, question 22) Could you please provide the reasoning behind a desired site visit to comparably sized locations given the**

**current environment with COVID-19? Would CSB consider a video conference or teleconference with such entities instead?**

- Yes, CSB will consider a video conference or teleconference with such entities instead.