

# HMIS Request for Proposal

## 1.0 Introduction and Background

### 1.1. Purpose

The purpose of this document is to solicit the services of exceptional software vendors who will partner with us over the long term to deploy, operate, and maintain a data solution that will be used to coordinate and improve services to people experiencing housing instability and homelessness across Central Texas.

### 1.2. Overview of the Organization

Ending Community Homelessness Coalition (ECHO) has a mission to lead and align coalitions to administer an effective Homelessness Response System, centered in racial equity, that is informed by the needs and expertise of people experiencing homelessness and accountable to systematically marginalized communities.

ECHO is a 501(c)3 non-profit organization and has been the Austin/Travis County HMIS Lead Agency since 2012.

### 1.3. Project Background

This data system will function as the Homeless Management Information System (HMIS) for Austin/Travis County's Homelessness Response System. The current HMIS has been operating since 2012 and is a critical tool for understanding and improving our efforts to combat homelessness. We seek a new HMIS that harnesses the latest advancements in technology and offers functionality, scalability, and flexibility to better meet the evolving needs of our community and fully support our work to end homelessness.

## 2.0 Objective and Goals

### 2.1. Project Objective

Transition our diverse user base to a new HMIS solution with minimal disruption to CoC duties and operations.

### 2.2. Long-term Goals

2.2.1. Solution must function seamlessly as Austin/Travis County's HMIS and meet HUD compliance standards on an ongoing basis.

2.2.2. Foster meaningful data exchange between other HRS partner data systems for enhanced system operations and optimal outcomes.

## 3.0 Vendor Qualifications

- 3.1. At least five years of experience developing and providing an HMIS
- 3.2. At least five years of experience translating federal grant guidelines and program regulations into software requirements leading to implementation of software solutions that meet federal, state, and local reporting requirements
- 3.3. At least five years of experience working with private, nonprofit, and public entities providing services to persons experiencing homelessness
- 3.4. At least five years of experience in data hosting, data storage, data security, network operations, backup, and uptime, as well as redundancy of all systems for a large jurisdiction with multiple users in multiple agencies
- 3.5. Demonstrated success in legacy data migration support (import and export) and ongoing data integration (import and export) across multiple software solutions using the CSV schema at a minimum mandated by HUD
- 3.6. Demonstrated ability to collect and generate all HUD required Universal and Program Specific Data Elements and Reports
- 3.7. Meet all HUD and local CoC compliance requirements of current HMIS data standards and regulations regarding privacy and confidentiality

## 4.0 Scope of Work

### 4.1. Summary of Services Required

- 4.1.1. Solution shall comply with all HUD and Federal Partner expectations and requirements related to HMIS, both at time of deployment and throughout its lifecycle as Austin/Travis County's operational HMIS.
- 4.1.2. Comprehensive project and risk management shall be provided from project start through deployment resulting in a smooth transition to post-deployment support and partnership.

### 4.2. Key Tasks and Activities

- 4.2.1. **Planning:** Collaborate with our team to set project management roles, responsibilities, and communication expectations. Clarify and finalize a project plan before work begins.
- 4.2.2. **Facilitated discovery sessions:** Collaborate with our team to understand the needs that are specific to our CoC and existing HMIS; create a foundation for strategic data solution growth.
- 4.2.3. **Development and configuration:** Build the solution, including user interfaces, user roles and permissions, workflows, reports, and documentation.

- 4.2.4. **Data migration:** Perform and validate data migration as identified during discovery
- 4.2.5. **Solution testing:** Conduct functional and performance testing to ensure system operates as expected; Plan and execute user acceptance testing
- 4.2.6. **Training:** Prepare and execute a plan for training users on how to use the new solution
- 4.2.7. **Deployment:** Plan for and deploy the solution in production; provide elevated support during launch to ensure a smooth transition
- 4.2.8. **Ongoing maintenance and support:** Provide ongoing maintenance and support as required; maintain continuity of solution documentation to facilitate additional contract work for strategic, iterative solution growth

### 4.3. Requirements

For additional insight to our requirements, see also Appendix A: Proposal and Demonstration Evaluation Criteria

- 4.3.1. **Key workflows and business processes:** Solution should provide meaningful and optimal user experience for staff, managers, and executives during the following workflows:
  - Street outreach
  - Coordinated entry
  - Shelter operations
  - Transitional housing operations
  - Permanent housing program operations
  - Homelessness prevention
  - Provision of supportive services
  - CoC administration
    - HRS performance evaluation
    - HMIS operations
- 4.3.2. **HUD and HMIS compliance:** Compliance with HUD and Federal Partner expectations for data collection and HMIS system functionality is paramount. The proposed solution must comply with current standards as well as future standards in timely fashion. The vendor shall be responsible for identifying and implementing all relevant HUD and Federal Partner guidelines and standards published to <https://www.hudexchange.info/programs/hmis/>.
- 4.3.3. **System administration:** Solution shall provide HMIS Lead Agency users with robust user management and data correction features, including but not limited to:
  - Ability to troubleshoot user inquiries and questions
  - Ability to update multiple records at once
  - Ability to correct common data entry errors such as duplicate client records and incorrect project ID

- Ability to reorganize project and organization relationships at no additional cost
- Ability to communicate with all system users
- Customizable user experiences based on role and organization
- Clear and easy to understand user license management
- Ability to track user access, system activity history, and training milestones

4.3.4. **Business intelligence (BI):** The solution should offer robust reporting systems that allow for various levels of insight across all key workflows and business processes for authorized users. Features shall include but not be limited to:

- Restful API access to BI system data with well-maintained documentation
- Clear, clutter-free interface that is meaningful based on user roles
- Ability to query all data entered into the system (and derived business intelligence results) in real-time or near-real-time.
- BI workflow automation features that include report scheduling

4.3.5. **Data sharing and systems interoperability:**

- Capacity for secure data exchange with external systems, such as healthcare providers and other participating CoC agencies.
- Ability to scale systems interoperability to real-time or near-real-time data exchange over time
- Capacity for interoperability with Health Data Exchanges

4.3.6. **Security and privacy**

- Meet (or exceed, where new industry standard best practices have emerged) HMIS privacy and security practices described in [2004 HMIS Data and Technical Standards Notice](#), Section 4 (beginning on Page 45927).
- Provide sufficient security protocols with regards to securing website connections, authenticating server identities, maintaining data integrity between transmission, user inactivity time-outs, and user password updates
- Provide disaster recovery plan for no additional charge
- Provide enhanced security for social security numbers such as masking or requiring additional authentication to view entire SSN

4.3.7. **Post-deployment service level requirements**

- 99.9% system uptime, including full functionality of all HUD-specified import and export features
- At least 2 business days' prior notification of any planned system downtime
- Upon release of standards updates from HUD and Federal Partners, Vendor must:
  - Communicate with CoC HMIS Lead about timeline and progress for implementation and be willing to contractually commit to a timeframe
  - Independently perform comprehensive quality assurance testing prior to engaging the CoC Lead Agency for User Acceptance Testing (UAT)
  - Provide a test environment where standards compliance can be tested and validated by CoC Lead Agency (UAT) prior to production deployment

4.3.8. **Documentation:** Comprehensive and up-to-date system documentation is critical to the long-term success and sustainability of our new HMIS. We seek exceptional documentation content and features, with resources across the solution that are:

- Well-organized and meaningful according to user roles
- Regularly updated to reflect all changes or enhancements made during the system's life cycle
- Descriptive of all application features, user workflows, technical specifications, data models, and security protocols

4.4. **Current database information**

Component	Count
Users	715
Participating Agencies	70
Reporting Licenses	132
Active Projects	315
Unique Question Fields	556
Client Records	232,900
Custom Reports	50

HMIS Projects currently operating and marked as HMIS participating as of July 2024:

HMIS Project Type	Count of Projects
Coordinated Entry (CE)	1
Homelessness Prevention (HP)	21
Night-by-Night Shelter (NbN)	2
Other (O)	94
PH - Housing only (PH-H)	1
PH - Housing with Services (PH-S)	5
PH - Permanent Supportive Housing (PSH)	34
PH - Rapid Re-housing (RRH)	46
Services Only (SSO)	42
Street Outreach (SO)	26

Transitional Housing (TH)	21
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## 5.0 Proposal Guidelines

Please include the following in your proposal. Proposals that fail to include each of the following items will not be considered.

### 5.1. Executive summary

### 5.2. Company information

- 5.2.1. **Company Overview:** Please identify the vendor who will complete the work proposed, and briefly describe the organization's name, years in business, location, and size.
- 5.2.2. **Relevant Experience:** Please describe previous projects in which you have successfully delivered and supported HMIS in other CoCs.
- 5.2.3. **Key Personnel:** Please identify the staff who will be performing the work proposed, including the Proposal Point of Contact, as well as:
  - For each staff member -- their role, experience, and qualifications
  - The time zones and normal business hours in which staff will be conducting the proposed work
  - A clear statement indicating the Proposal Point of Contact is authorized to conduct business and respond to this RFP on behalf of the organization.

### 5.2.4. Technical proposal

Please explain the technical aspects of the solution you are proposing to address our [Requirements in section 4.3](#). Your proposal must include, at minimum, a response to the following prompts:

1. **Hosting and System Maintenance:** Please describe your server hosting model
2. **Technical Support before and after the transition:** Please describe training for system administrators, the system in place to respond to questions, bugs, and resources available. Please provide information regarding costs, if any.
3. **System Security and Privacy:** Please describe the overall System Security and Privacy, including the HMIS Lead's ability to audit user access within the database and reporting tool.
4. **End User Security and Privacy:** Please describe end user security and privacy in detail and it pertains to access, restrictions, passwords, inactivity, and other information pertaining to privacy security.

5. **Data Ownership:** Please describe ownership over the data entered into the system
6. **Business Intelligence:** If you have a reporting tool available for HMIS leads and agency staff to use, please describe it and its capabilities in detail. Include a summary of license structure and associated costs, if relevant.
7. **API, ODBC, or Direct Database Connection:** Do you allow HMIS Leads to connect directly to the database with other tools for reporting purposes? Please describe.
8. **Data Integration, Exchange, and Access:** All HMIS data elements exportable in current HMIS CSV format in a single dataset including multiple projects/project types/funders. Please expand on this topic.
9. **Demonstration Site during RFP:** Is there a Demonstration Site available? Please describe.
10. **End User Training Site:** Is there an End User training site available? Please describe.
11. **Data Migration:** Please describe the general timeline.
12. **Planned System Updates:** Are there any planned architectural or enhancements updates? If so, please describe.

#### 5.2.5. **Implementation plan**

Please describe how your organization will manage the project both before and after solution deployment.

#### 5.2.6. **Cost proposal**

Provide a detailed, itemized cost breakdown, including Licensing fee schedules, implementation costs, estimated data migration costs (can be a range), customization fees, training costs, ongoing support and maintenance fees.

#### 5.2.7. **References**

Please provide a minimum of three current customers.

#### 5.2.8. **Product demonstration**

Vendors submitting qualified proposals may be invited to provide a demonstration of their software platform's ability to meet our needs, including our stated requirements.

## 6.0 Evaluation Criteria

All proposals will be evaluated for the following criteria:

- 6.1. **Technical Capabilities**
- 6.2. **Compliance with HUD and Federal Partner Standards related to HMIS**
- 6.3. **Vendor Experience and References**
- 6.4. **Cost Efficiency**
- 6.5. **Consideration of RFP objectives, goals, and scope of work**
- 6.6. **Project Timeline**
- 6.7. **Clarity and readability**
- 6.8. **Product demonstrations**, which will be evaluated using the scoring matrix attached as Appendix A.

In addition to these proposal criteria, each software platform being considered for selection will be reviewed against each performance criteria listed in Appendix A: Proposal and Demonstration Evaluation Criteria.

## 7.0 Contract Terms and Conditions

- 7.1. **Legal Requirements**
- 7.2. **Payment Terms**

## 8.0 Submission and Contact Information

### 8.1. **Submission deadline**

November 21<sup>st</sup>, 2024, by 5:00pm CST

### 8.2. **Submission format**

Please submit all proposal documents digitally in PDF format.

### 8.3. **Point of contact**

Please submit proposals to:  
Whitney Bright  
HMIS Director  
[whitneybright@austinecho.org](mailto:whitneybright@austinecho.org)



## Appendix A: Proposal and Demonstration Evaluation Criteria