

**City of New Bedford, Massachusetts  
Mayor Jon Mitchell**

**Department of Planning, Housing & Community Development  
Patrick J. Sullivan, Director**

**Request for Proposals**

**Development and Operation of a  
Homeless Management Information System**



**PROPOSAL DEADLINE:**

**Friday, August 18, 2017 at 2:00 p.m.**

**ISSUED BY THE:**

**City of New Bedford  
Department of Planning, Housing & Community Development  
608 Pleasant Street  
New Bedford, MA 02740**

**tel. (508) 979-1500**

<http://www.newbedford-ma.gov/planning-housing-community-development/>

**PROPOSAL FOR CONSULTING SERVICES FOR THE DEVELOPMENT AND OPERATION OF A HOMELESS MANAGEMENT INFORMATION SYSTEM FOR THE NEW BEDFORD CONTINUUM OF CARE**

Sealed proposals will be received at the City of New Bedford, Department of Planning, Housing and Community Development, 608 Pleasant Street New Bedford Massachusetts 02740 until **2:00 pm on Friday, August 18, 2017** for providing the following services to the City of New Bedford Attention:

Jennifer Clarke, Deputy Director  
City of New Bedford  
Department of Planning, Housing and Community Development  
608 Pleasant Street  
New Bedford, MA 02740  
e-mail [Jennifer.Clarke@newford-ma.gov](mailto:Jennifer.Clarke@newford-ma.gov)

Copies of the Request for Proposals may be obtained at the Department of Planning, Housing and Community Development on or after **Friday, July 28, 2017**, 8:00 a.m. to 4:00 p.m. Mondays through Fridays. This RFP may be downloaded from the City's website: <http://www.newbedford-ma.gov/planning-housing-community-development/>. The City of New Bedford reserves the right to reject any or all proposals, waive any minor informalities in the proposal process, and accept the proposal deemed to be in the best interest of the City.

Questions concerning the Request for Proposals must be submitted in writing by **12:00 noon on Friday, August 10, 2017** to Jennifer Clarke, Deputy Director at the address above or by e-mail to [Jennifer.Clarke@newbedford-ma.gov](mailto:Jennifer.Clarke@newbedford-ma.gov).

**Sealed proposals marked: "City of New Bedford Homeless Management Information System Proposal" containing one (1) original and six (6) copies** must be received by Jennifer Clarke, Deputy Director, City of New Bedford, Department of Planning, Housing and Community Development 608 Pleasant Street, New Bedford, prior to **12:00 p.m., Friday, August 18, 2017**. Any proposals received after such time will not be accepted, unless the date and time has been changed by addendum. Delivery to any other office or department does not constitute compliance with this paragraph, unless the proposals are received by the established deadline.

# PROPOSAL FOR CONSULTING SERVICES FOR THE DEVELOPMENT AND OPERATION OF A HOMELESS MANAGEMENT INFORMATION SYSTEM FOR THE NEW BEDFORD CONTINUUM OF CARE

---

## GENERAL CONDITIONS AND REQUIREMENTS

### 1. **Proposal Rules**

This Request for Proposal (RFP) is solicited to the General Public pursuant to the rules set forth in Chapter 30B of the Massachusetts General Laws and a subrecipient agreement will be awarded by the City of New Bedford. **The City of New Bedford is an equal opportunity and affirmative action employer. Women, minorities, and individuals with disabilities are encouraged to apply.**

### 2. **Reviewing Period**

All proposals meeting RFP requirements and conditions may be held by the City of New Bedford for a period not to exceed sixty (60) days from the date of the opening of proposals for the purpose of reviewing the proposals and investigating the qualifications of consultants, prior to the awarding of the contract.

### 3. **Budget**

The City of New Bedford has a budget for this project of for one year, renewable annually, subject to mutual agreement of the parties and the availability of funding. All funding is subject to HUD funding through the annual CoC competitive application process.

### 4. **Compliance with Applicable Laws**

The contract shall be governed by and construed in accordance with the laws of the Commonwealth of Massachusetts. The proposal must comply with all Federal, State, and municipal laws, ordinances, rules and/or regulations.

### 5. **Questions and Interpretations**

Technical assistance questions regarding the proposal should be addressed in writing at least five (5) working days prior to the date and time for receipt of proposals to Jennifer Clarke, Deputy Director, Department of Planning, Housing and Community Development, 608 Pleasant Street, New Bedford, MA 02740 or by email to [Jennifer.Clarke@newbedford-ma.gov](mailto:Jennifer.Clarke@newbedford-ma.gov).

All answers and interpretations and any changes to the documents will be issued in the form of addenda to all consultants of record, and will be posted on the City web site at: <http://www.newbedford-ma.gov/planning-housing-community-development/>.

### 6. **Ability and Experience**

The City of New Bedford will not award a contract to any consultant who cannot furnish satisfactory evidence of their ability and experience to perform the requested services.

The City of New Bedford may make such investigations as it deems necessary to determine the above and a consultant shall furnish information requested in this regard.

### 7. **Certification of Non-Collusion**

All consultants must sign the attached certificate of non-collusion. This signed form must be submitted with the proposal package. Failure to sign and submit the form is cause for that proposal to be rejected.

8. **Corrections**

Erasures or other changes in the proposal must be explained or noted over the signature of the consultant.

9. **Conflict of Interest**

The consultant agrees that to the extent that such law is applicable to the duties it is to perform hereunder, it will comply with the provisions of Chapter 268A of the General Laws concerning conflict of interest. The consultant covenants that it presently has no interest and shall not require any interest, direct or indirect, which would conflict in any manner or degree with the performance under the agreement.

No employee of the City of New Bedford and no public official who exercises any function or responsibilities in the review or approval of the undertaking or carrying out of this agreement shall participate in any decision relating to this agreement which affects his personal interest or the interest of any corporation, partnership, or association in which he is directly or indirectly interested or have any financial interest, direct or indirect in this agreement or the proceeds thereof.

10. **Prospective Consultant's Qualifications**

The prospective consultant replying to the RFP shall be or represent a firm, company or corporation possessing experience and expertise in planning, community development and/or a related field and the professional standards thereof, to undertake and successfully complete the Scope of Services as outlined in this RFP.

11. **Signature**

All proposals shall be complete, factual, and signed by an authorized officer of the consultant's company on the appropriate page(s).

12. **Waiver**

The City of New Bedford reserves the right to reject any and all proposals, or to waive any informality in the proposal process, if deemed in the City's best interest.

13. **Number of Copies**

The proposer shall provide a sealed envelope containing one (1) original and six (6) copies of the proposal marked "City of New Bedford – Homeless Management Information System".

14. **Place and Time**

Sealed proposals will be received at the City of New Bedford's Department of Planning, Housing and Community Development, 608 Pleasant Street, New Bedford, MA 02740 until 2:00 p.m., Friday, August 18, 2017 at which time and place they will be opened and recorded.

15. **Modifications**

A consultant may correct, modify, or withdraw a proposal by sealed, written notice clearly marked as a correction, modification, or withdrawal and received at the City of New Bedford's Department of Planning, Housing and Community Development prior to the time and date set for the proposal deadline.

**Failure to comply with the above conditions and requirements or any attached specifications or any other minimum qualifications will be justification to reject any proposal as incomplete.**

## INTRODUCTION

The City of New Bedford's Department of Planning, Housing and Community Development (DPHCD), acting on behalf of the New Bedford Continuum of Care (CoC), is requesting proposals from qualified firms (Consultant) to undertake the secure and accurate migration of data from its existing HMIS (system) to a new HMIS (system) to be operated and managed by the Consultant for the period October 1, 2017 – September 30, 2018 with two additional annual renewals as may be extended by mutual agreement dependent on HUD funding.

The purpose of this RFP is to secure software as a service for the City of New Bedford Continuum of Care's (CoC) Homeless Management Information System (HMIS) needs. As the Collaborative Applicant and HMIS Lead Agency for the New Bedford CoC, the City of New Bedford Department Planning Housing and Community Development (DPHCD) is seeking an HMIS software vendor to facilitate efficient collection of HUD required data elements, ensure compliance with the latest HMIS Data Standards, and to improve capacity for program compliance monitoring and reporting on system-level performance.

With this RFP, DPHCD, in collaboration with the New Bedford CoC, means to select software as a service solution for its HMIS data collection, data integration, and reporting.

**The proposer must meet all Federal regulations with respect to the development and operation of an HMIS (system) for the New Bedford CoC.**

---

### Background

The City of New Bedford is an historic seaside community located 54 miles south of Boston and 33 miles east of Providence, Rhode Island. As an independent Continuum of Care (CoC), each year the New Bedford CoC receives approximately \$1.7 million in McKinney Vento CoC funds and an additional \$216,000 in Emergency Solutions Grant funding.

Although the New Bedford CoC actively collaborates with the Fall River CoC and Greater Attleboro Taunton CoC, both of which comprise the remainder of Bristol County and, (with New Bedford) constitute the South Coast Network to End Homelessness (SoCo), the City of New Bedford is an independent CoC and HUD grantee. As such this RFP will result in the selection of a vendor and subsequent contract execution between the City of New Bedford and vendor. While it would benefit the three CoCs within Bristol County to have the same HMIS service vendor, this RFP will result in an independent contract serving the New Bedford CoC.

---

### Scope of Current HMIS

Measure	Existing
Number of Active Users	15
Number of Active Programs	25
Number of Active Agencies	8
Number of Programs in the System	25
Number of Programs that will participate in data integration	25
Current Reports Available	AHAR, PIT, HIC, APR, QPR
Customized Reports Available	System Performance Measures in the aggregate

---

### Schedule

The City of New Bedford reserves the right to revise the following schedule at any time and without notice to the respondents or prospective respondents:

ACTIVITY	DATE
RFP Released	July 28, 2017
Questions	Due in writing by 12noon August 10, 2017
Responses to Questions	August 15, 2017
Proposals Due	August 18, 2017 at 2 p.m.
Proposal Review by Selection Committee	August 2017
Remote demonstrations	TBD - If needed
DPHCD reviews evaluations and makes selection	August 2017
Contract execution with successful vendor	September 2017

---

### Definitions

Definitions for the purposes of this RFP include:

**DPHCD** – City of New Bedford, Department of Planning Housing and Community Development – The Collaborative Applicant and HMIS Lead agency of the New Bedford CoC; organization that is issuing this RFP

**Data Integration** – Transmission of and acceptance of transmitted data from other HMIS software programs according to the specifications for Comma Separated Values (.CSV) and/or XML Schema on the HUD Exchange website

**Homeless Management Information System (HMIS)** – A federally mandated, locally driven data collection system used to collect unique identification and reporting of persons experiencing homelessness across a regional housing assistance network of private, nonprofit, and public entities. HMIS must conform to the published standards and any updated standards on the HUD Exchange website.

**HUD** – U.S. Department of Housing and Urban Development

**HUD Exchange** – The website used by U.S. Department of Housing and Urban Development (HUD) to issue all updates and information regarding HMIS

**HUD Mandated Reports** – Report required for HUD funded projects; comprised of 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

**City of New Bedford Continuum of Care** - a system of services and an administrative entity that applies for annual funding from the U.S. Department of Housing and Urban Development(HUD)

**Proposal** – A formal offer submitted in response to this solicitation

**Request for Proposal (RFP)** - Formal procurement document in which services needed are identified and firms are invited to submit their proposal to provide the services and their overall rate not to exceed the stated annual cap.

**RFP Respondent** – individual, company or firm submitting a Proposal to attain a contract with City of New Bedford, DPHCD

---

## **CONTRACT TERMS AND CONDITIONS**

### ***Proposal Preparation***

The prospective consultant is to follow the instructions and requirements of the proposal submission requirements in preparing and submitting their response to the RFP.

### ***Cost Liability***

The City of New Bedford assumes no responsibility and no liability for costs incurred relevant to the RFP by prospective consultants prior to issuance of a contract.

### ***Selection of Proposals***

The City of New Bedford shall award a professional consulting contract to the responsible prospective consultant whose proposal conforms to the RFP, is the most advantageous to the City of New Bedford, and meets the requirements as stated in the proposal submission requirements.

The selected consultant will be required to sign a subrecipient agreement with the City of New Bedford in which she/he accepts responsibility for the performance of services as stated in the submitted proposal and be prepared to commence work immediately upon execution of the signed subrecipient agreement and receipt of a Notice to Proceed.

### ***Acceptance of Proposal Content***

The contents of the proposal of the successful consultant, in its entirety, shall form the base of any contract that is awarded.

### ***Successful Consultant Responsibilities***

The successful consultant will be required to assume sole responsibility for the complete project as required by this RFP. The City of New Bedford will consider the successful consultant to be the sole point of contact with regard to contractual matters, whether or not subcontractors are used by the successful consultant for one or more parts of this project. The successful consultant will be responsible for representing the City in any discussions with HUD regarding the Strategic Plan that is to be prepared.

### ***Subcontracting***

Subcontracting will be allowed for tasks required by this RFP. Any intent to subcontract on the part of the prospective consultant must be specifically described in the proposal. The City of New Bedford reserves the right to approve the use of all subcontractors.

### ***Ownership of Material***

All rights, titles to and ownership of all data, material, and documentation resulting from this project and/or prepared for the City pursuant to this contract shall remain exclusively with the City. The prospective consultant shall be paid for all service as will be specified in the contract.

### ***Additional Requirements***

During the project's contract, the selected Consultant will attend all required meetings without additional compensation. In addition, the Consultant will meet with DPHCD staff at the start of the project and as necessary throughout the project to review recommendations and project status and provide technical assistance. The selected Consultant we be expected to attend any relevant/required HUD briefings and training without additional compensation.

### ***Price Change***

All prices shall be firm and not subject to increase during the period of this contract.

## **SCOPE OF WORK**

Specific tasks to be undertaken by the selected HMIS vendor shall include, at a minimum:

### **A. General Tasks**

- The design, implementation and support of an HMIS (system) for the New Bedford CoC.
- Training, supporting and working with private, nonprofit, and public homeless service providers; and
- The execution of data conversion/migration to new application, data validation and quality assurance.

### **B. Regulatory Compliance**

- Vendor and product ongoing timely compliance with all relevant HUD required data collection structures and reporting modules;
- The provision and support of software that facilitates the full and accurate collection of all HUD-mandated data elements;
- Future modifications to the software to ensure ongoing compliance of the latest HUD data standards, HMIS regulations and national best practices.

### **C. Security and Privacy**

Providing a system that includes security functions to ensure protection of client confidentiality. Security features should include:

- User authentication (no concurrent access);
  - Virus protection with auto-update;
  - Servers that include data encryption and transmission encryption;
  - Public access and location controls;
  - Backup and data disaster recovery;
  - System monitoring;
  - Secure disposal;
  - Automated monitoring and audit trail;
- 
- Ability to define and amend user access levels to client information; and
  - Access restrictions based on user role and/or permissions are enforced consistently throughout the software solution, including reporting, data sharing, and export features.



**D. Core Functionality**

Providing software that includes:

- An intuitive and efficient workflow that minimizes the burden on front end users;
- A user interface that is easy to navigate and provides consistent page views;
- Capacity for document generation – readable, printable blank forms and completed forms;
- Document upload storage – for consent forms, verifications, rental agreements, stabilization plans, etc.;
- Built-in measures to prevent data entry mistakes and back end reporting to identify data entry errors and guide data cleanup for users;
- Software with case management tools for recording case notes, follow up, query on no contact within number of days;
- A referral system and referral tracking;
- Robust deduplication measures to identify and prevent duplicate client entries; and
- Matching functionality to unduplicate records across agencies (not dependent upon data sharing).

**E. Support, Training and Customer Service**

- Vendor is expected to provide technical documentation including user manuals and online help relevant to introductory training as well as ongoing support. The following documentation is expected:

Data Dictionary  
Reporting Module Guidance  
Database Design and Navigation  
Workflow for entering client information  
User manuals specific to HMIS data entry

- Providing “Train the Trainer” modules for implementation of new system and for standard ongoing training;
- Offering online customer support center that allows ability for reporting issues and straightforward bug tracking;
- Developing and implementing Quality Assurance protocols related to every software upgrade, release, enhancement or other system change; and
- Ensuring that the timing of release, description, and communication are coordinated.

**F. Data Imports and Integration**

- Development and implementation of an open and flexible platform that maximizes opportunities for data integration across multiple software solutions, including a contractual commitment to support the latest XML and CSV schema defined by HUD.
- Support for the batch import and export of data from agencies who enter program data into a separate system.

**G. Reporting and Performance Measurement**

- Production of current standard HUD reports directly from the system: APR, AHAR, PIT, CAPER;
- Production of System Performance Measurement reporting at a CoC wide level and at a program level where applicable.
- Production of Quarterly APRs by program.
- Generation of standard project and agency level reports that track enrollments, dismissals, demographics, etc. for funders and other stakeholders;
- Provision of User Information Reporting: User license periods, contact records, training, login activity, inclusion in metadata for client record creation, edit, and name stamp on HUD Assessment submissions or edits;
- Client level reporting across CoCs as may be needed in order to participate with other MA CoCs in data generation, client level reporting/tracking and understand program outcomes.

#### H. **Coordinated Entry and Prioritization**

Software should contain functionality to support a single coordinated access system. This should include:

- Provision of software with functionality to support a single coordinated access/entry system. (The New Bedford CoC's coordinated entry system is shared with the Fall River CoC and the Greater Attleboro Taunton CoC.)
- Availability of the VI-SPDAT, with the ability for local customization of a common assessment tool used by the New Bedford CoC;
- Robust referral notification system; and
- Ability to view client's VI-SPDAT score within the client record.

### **FINAL WORK PRODUCTS**

In addition to providing ongoing services for the City of New Bedford's HMIS, the Consultant is responsible for submitting timely required HUD reporting and City reports in a format acceptable to both HUD and the City.

All deliverables will become property of the City of New Bedford.

### **PROPOSAL SUBMISSION REQUIREMENTS**

The information submitted must include, but should not necessarily be limited to, the following items:

1. **Cover Letter.** A letter signed by an officer of the firm, binding the firm to all comments made in the proposal is required. Include a primary contact person for the proposal.
2. **Narrative Response to Scope of Services.** Proposers shall provide a comprehensive written description of each system element, feature, service, etc. required by the Scope of Work that it proposes to provide to the City. These descriptions shall reference the section item being responded to and shall include the scope and particular features and benefits of the proposer's provision of these elements, features, services, etc., and detailed descriptions of functionality as defined in the scope of services. These descriptions shall demonstrate the proposer's understanding of the City's requirements and the proposer's ability to provide and effectively operate the services and systems required by the City. The narrative should include each of the elements described under the Scope of Services section of this RFP.
3. **Qualifications and Experience.** A description of the history, experience and qualifications of your firm and any proposed subcontractors to perform the Scope of Services. Please provide:
  - a. Names and addresses of all firms involved on the project (including any subcontractors);
  - b. History, size and structure of firm(s);
  - c. Name(s) of principals in firm(s);
  - d. Identification of Principal in Charge, the Project Manager and the roles of other key personnel. Include relevant project experience and copies of resumes of all personnel assigned to project; describe other similar projects your firm has undertaken with contact information. Please make specific reference to experience and qualifications as they are related to HMIS implementation/training/operation, experience/qualifications of assigned staff and experience/success implementing similar projects for municipalities, particularly regarding homelessness. If any part of the HMIS process will be subcontracted, please provide the same information for the subcontracting firm/s;

- e. List three (3) client systems that are most similar to the systems requirements stated in the City's scope of services and most similar in terms of number of projects, users, participants served, and complexity of configuration and include a brief narrative that explains why the City should consider this reference/these references a relevant experience and why it is similar to New Bedford's requirements. List should include the following for each client reference:

Client Organization Name and Address  
 Duration of Contract  
 Dates of Operation  
 Website  
 Contact Person Name, Title, Phone Number and Email Address

*Please note—references will be asked about their experience with the vendor including the following areas:*

- i. *Responsiveness to customer service requests*
  - ii. *Quality of staff*
  - iii. *Technical support and training*
  - iv. *Coordinated entry*
  - v. *Conversion process from one system to new HMIS*
  - vi. *Knowledge and experience with most recent release of HMIS Data Standards*
  - vii. *Ease of system use and reliability, and*
  - viii. *General assessment of quality and effectiveness of the vendor's services*
- f. Listing of contracts currently under contract; and
- g. Contact information for references from similar projects.

The following must also be included:

- One copy of multiple report types produced from another HMIS system for which the Consultant has been responsible.
- An electronic link of another HMIS system you've developed/implemented/operated to provide a sense of the HMIS being proposed.

4. ***Organizational Plan and employee background information for all staff who will be contributing to the operation of the proposer's system and will be providing related support services.*** For all employees who are proposed to support the New Bedford HMIS, please provide their names and titles, information about their roles and responsibilities and qualifications including related skills and experience. Resumes of key (and other if the proposer desires) personnel should be provided.

Proposers should also include organizational chart(s) and/or a description of the management plan for all divisions that are proposed to contribute to the operation of the HMIS, so that the City will have as full an understanding as possible of the proposer's organization and plan for operating the HMIS.

5. ***A description of the proposer's data center hardware and technical environment.*** Proposers should provide a description of their data center hardware and technical environment, as well as the proposer's security protocols, back-up and disaster recovery plan.
6. ***Management Plan and Project Timeline.*** Provide a detailed, comprehensive timetable and plan to convert each element of the existing vendor's system to that of the selected vendor. Include the duration of the conversion and key milestones in the timetable proposed. This plan shall include the responsibilities of the proposer, the City and the existing vendor; a description of how the accuracy of the conversion effort will be measured; identification of the project manager, the experience this individual has had in converting similar

systems, and the estimated amount of time that the project manager will dedicate to the project; and the details of the proposer's post-conversion support plan. The proposer should describe its previous experience converting data in a situation similar to what this project will entail.

7. **Approach to Scope of Work.** A detailed description of the approach to Scope of Services is required. The City is seeking a reliable, creative, comprehensive, easy to use and proven HMIS system to inform and enhance its data capabilities in accordance with HUD standards to ensure the greatest accuracy, compliance with all HUD reporting, ease of use at the individual program level and ease of use at the administrator level so that the City can routinely pull program-specific and aggregated data and produce compelling, clear reporting. To this end the proposal must demonstrate the Consultant's:
  - Approach to effectively implementing a new HMIS system within the New Bedford CoC (including secure and accurate data migration), customization of software as may be needed in order to achieve CoC's reporting needs at both a program level and system level, installation, training, technical support and hosting related to the CoC's HMIS system.
  - Innovative ideas for maximizing the value and amount of work that can be completed within the budget available for this contract as well as rationale and evidence of the value and effectiveness of the proposed approach to the scope of work;
  - Experience with web based or electronic Federal Government regulations, experience with the HUD reporting expectations concerning homelessness, best practices around homelessness and HMIS systems;
  - Understanding of, and commitment to, effectively connecting the CoC's coordinated entry with HMIS; and
  - Additional recommendations not identified in the scope of service.
8. **City Resources.** A list of the resources, personnel, data, or other assistance which the proposer expects are required from the City in order to complete each task in the scope of services during the planned time period.

The City will be responsible for:

  - Convening an initial orientation/training meeting for all HMIS users.
  - Providing the Consultant with copies of any previously issued HMIS reporting.
  - Serving as HMIS administrator throughout the duration of the contract.
9. **References.** Provide three (3) references from individuals familiar with your work on HMIS (systems).
10. **Threshold Requirements.** The proposer must complete the Threshold Requirements table included in the section entitled, "Evaluation Criteria" and include it with the non-price proposal.
11. **Consultant Services Cover Sheet.** Complete form that is part of this RFP and place as cover to non-price proposal.
12. **Price Proposal Form.** Sign and submit the form that is part of this RFP.
13. **Certificate of Non – Collusion.** Sign and submit the form that is part of this RFP.
14. **Form for Tax Compliance.** Sign and submit form that is part of this RFP.

## PROPOSAL CONTENTS

All costs associated with the services set forth in this RFP must be included in the price. Price must remain firm for the entire contract.

1. **Sealed proposals marked: "City of New Bedford Homeless Management Information System Proposal" containing one (1) original and six (6) copies** must be received by Jennifer Clarke, Deputy Director, City of New Bedford, Department of Planning, Housing and Community Development 608 Pleasant Street, New Bedford, prior to **12:00 p.m., Friday, August 18, 2017**. Any proposals received after such time will not be accepted, unless the date and time has been changed by addendum. Delivery to any other office or department does not constitute compliance with this paragraph, unless the proposals are received by the established deadline.
2. **The Price Proposal form must be completed as instructed. No substitute form will be accepted. Pricing must remain firm for the duration of the contract. The proposal submitted must be without conditions or exceptions.**
5. Failure to answer any questions, to complete any form or to provide the documentation required will be deemed non-responsive and will result in automatic rejection of the proposal unless the City determines that such failure constitutes a minor informality, as defined in Chapter 30B.
6. All interpretations of the RFP and supplemental instructions will be in the form of written addenda to the RFP specifications. Requests for clarification or any questions about information contained in the RFP should be addressed in writing to:

Jennifer Clarke, Deputy Director  
City of New Bedford  
Department of Planning, Housing and Community Development  
608 Pleasant Street  
New Bedford, MA 02740  
or e-mail [Jennifer.Clarke@newford-ma.gov](mailto:Jennifer.Clarke@newford-ma.gov)

**No requests or questions will be accepted after 12noon, Thursday, August 10, 2017.** Please include the name, address, e-mail address, telephone number and fax number, if available, of the person to whom additional information should be sent. Any information sent to one proposer will be sent to all proposers. **Answers to questions will be posted to the website in a form of an Addendum. Proposers are responsible for checking the website for addenda that may be issued.**

7. Proposals must be unconditional. However, prior to the proposal opening proposers may correct, modify, or withdraw proposals by written request to, Jennifer Clarke, Deputy Director, City of New Bedford, Department of Planning Housing and Community Development, 608 Pleasant Street, New Bedford, ma. 02740. A letter will be sufficient for withdrawal of a proposal up the date of the proposal opening. Any correction or modification to a proposal must be submitted in writing and in a sealed envelope labeled "New Bedford HMIS - Modification to (or Withdrawal of) Proposal.
8. **Detailed Description of Costs.** Provide a total not-to-exceed fixed fee. The City seeks proposals that demonstrate maximum value, innovation, effectiveness, and total work to be preformed within the funding available.
9. **Fee Proposal.** The fee proposal will be a lump sum price to provide all labor, equipment, time, materials and other items as necessary to meet the requirements of the scope of service.

10. **Detailed Cost Breakdown.** Provide a cost for each task identified in the Scope/Schedule on the price proposal form.
11. **Payment Schedule.** A payment schedule based on pre-established benchmarks will be negotiated prior to issuance of the contract. However, the successful applicant should be aware that a percentage of the contract will be held until the final plan product is delivered.
12. **Form for Cost Proposal.** Complete and sign form that is part of this RFP.

## EVALUATIONS OF THE PROPOSALS

All non-price proposals will be reviewed by the Selection Committee.

Proposers will be asked to host a remote interview on August 23, 2017, including demonstration of their HMIS software solution. Proposers will be responsible for providing the City with a call in number and web link. The project manager and other project team members should be prepared to participate in the interview. Interview participants will be expected to describe the proposer's approach to the New Bedford project and answer questions from the Selection Committee. Proposals that meet the Quality Requirements will be reviewed pursuant to the Comparative Evaluation Criteria listed in this RFP. The Selection Committee will assign a rating of Highly Advantageous, Advantageous, or Not Advantageous to each comparative evaluation criterion. Based on these ratings, a composite rating will be determined for each proposal.

References will be contacted to determine if the proposer is responsive and responsible. References will be asked about their overall impression of the proposer's quality of services performed and the timeliness of service delivery. The City reserves the right to use itself as a reference and to contact references other than those submitted by the proposer.

After evaluation of the non-price proposals is complete, the price proposals will be opened. The price proposals will be evaluated and ranked by the Selection Committee. The contract will not necessarily be awarded to the proposal that receives the highest rating with respect to the price proposal. The City will award the contract to only one responsive and responsible proposer submitting the most advantageous proposal taking into consideration the proposals' quality requirements, evaluation criteria and composite ratings, interview, references and price. Before awarding the contract, the City may request additional information from the proposer.

The City reserves the right to reject any and all proposals if it determines that the criteria set forth have not been met or for any other reason.

## MINIMUM EVALUATION CRITERIA

In order to be reviewed, the proposal must be substantially complete, meet the Qualifications listed in the RFP, and contain all necessary forms.

### Qualifications:

- Minimum of five (5) years of experience working with HUD homeless programs relative to data collection and HMIS capacities;
- Minimum of five (5) years of experience with HUD's CoC process; and
- Minimum of five (5) years of experience in implementing and operating HMIS data collection, warehousing and reporting in a manner consistent with HUD's evolving standards.

**Threshold Requirements:**

A “NO” response, a failure to respond, or a failure to meet any of the following minimum threshold requirements may result in a rejection of your proposal. Circle YES or NO for each item listed.

Threshold Requirements	Response	
1. The proposer has converted at least two HMIS databases into their own software solution.	YES	NO
2. The proposed HMIS will facilitate full and accurate collection of all HUD-mandated data elements as defined in the current HMIS Data and Technical Standards documentation (available online at: <a href="https://www.hudexchange.info/hmis/hmis-data-and-technical-standards/">https://www.hudexchange.info/hmis/hmis-data-and-technical-standards/</a> )	YES	NO
3. Proposer is prepared to contractually commit to ongoing compliance and support of the latest HUD data standards and HMIS regulations.	YES	NO
4. 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
5. The proposed HMIS will include an Audit Trail function to track changes to client-level records in the database.	YES	NO
6. The proposed HMIS must be fully compatible for use on Internet Explorer (Edge) and one of the following browsers: Chrome, Firefox, or Safari.	YES	NO
7. The proposed HMIS will generate an unduplicated count of clients within individual projects, across combinations of projects, and across the entire database, regardless of whether or not projects enter data into the system using uploads, and regardless of whether or not agencies have data sharing agreements in place.	YES	NO
8. 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
9. 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 as well as customized reports for the City of New Bedford.	YES	NO

**COMPARATIVE EVALUATION CRITERIA**

The proposal will be reviewed by the Department of Planning, Housing and Community Development and ranked using the following criteria:

*Evaluation Criteria begins on the following page.*

	Highly Advantageous	Advantageous	Not Advantageous
<p><b>A.</b> <b><u>Experience and Qualifications</u></b> <i>Ratings will be based on extent to which the consultant has been involved implementing successful HMIS projects in multiple jurisdictions.</i></p>	<p>The proposer has been involved in the successful implementation of HMIS projects or client data management projects of comparable complexity in at least five (5) jurisdictions including data migration work.</p>	<p>The proposer has been involved in the successful implementation of HMIS projects or client data management projects of comparable complexity in less than five (5) but in three (3) or more jurisdictions.</p>	<p>The proposer has been involved in the successful implementation of HMIS projects or client data management projects of comparable complexity in at least one (1) jurisdiction but less than three (3) jurisdictions.</p>
<p><b>B.</b> <b><u>Management and Organizational Plans</u></b> <i>Particular attention will be paid to evidence of successful past performance. Success of project, budget and timeliness may be determined by contacting references.</i></p>	<p>The proposer's Management Plan and Organizational Plan provide an excellent and extensive combination of staffing, coordination, and detailed description of implementation that provides the highest assurance of the proposer's ability to meet the requirements of the scope of services. The plan includes all of the following components: an organizational chart for the company; job descriptions of key staff; descriptions of staff roles and responsibilities, identification of a project manager; and a clear explanation of how all staff will work together to successfully provide all the services required by this RFP. The management plan identifies staff responsible for converting from another vendor's HMIS; these staff have prior experience converting a system similar in volume and features to that of New Bedford (this does not apply to the incumbent vendor).</p>	<p>The proposer's Management Plan and Organizational Plan provide a good combination of staffing, coordination, and detailed description of implementation that provides a high level of assurance of the proposer's ability to meet the requirements of the scope of services. The plan includes all but one of the following: an organizational chart for the company; job descriptions of key staff; descriptions of staff roles and responsibilities, identification of a project manager; and a clear explanation of how all staff will work together to successfully provide all the services required by this RFP. The management plan identifies staff responsible for converting from another vendor's HMIS and these staff have prior experience converting a system similar in volume and features to that of New Bedford (this does not apply to the incumbent vendor).</p>	<p>The proposer's Management Plan and Organizational Plan do not completely provide an adequate or clear combination of staffing, coordination, and detailed description of implementation; the plan provides a low level of assurance of the proposer's ability to meet the requirements of the scope of services. The plan includes all but two of the following: an organizational chart for the company; job descriptions of key staff; descriptions of staff roles and responsibilities, identification of a project manager; and a clear explanation of how all staff will work together to successfully provide all the services required by this RFP. The management plan identifies staff responsible for converting from another vendor's HMIS and these staff have prior experience converting a system similar in volume and features to that of New Bedford (this does not apply to the incumbent vendor).</p>

*Evaluation Criteria continues on the following page.*



	Highly Advantageous	Advantageous	Not Advantageous
<p><b>C.</b> <b><u>Project Timeline</u></b> <i>Particular attention will be paid to the detail provided that demonstrates ability to ensure successful data conversion/migration within the project timeframe—and that all other required reporting deadlines set by the City and/or HUD—can be successfully met.</i></p>	<p>The proposal indicates that the proposer will be able to meet the proposed deadline and explains in detail both baseline and additional resources that will be available if necessary for ensuring that the project timeframe does not slip. The proposal’s timeline includes detailed descriptions of responsibilities for the proposer and customer related to data conversion and migration and capability of meeting data import and integration elements in the Scope of Work within this RFP.</p>	<p>The proposal indicates that the proposer will be able to meet the proposed timeframe but only provides a cursory level of service and a cursory statement of additional resources that will be available to ensure that the timeframe does not slip. The timeline includes steps related to data conversion and migration, but responsibilities are not specified.</p>	<p>The proposal indicates that the proposer has committed to meeting the timeframe, but does not have additional resources to ensure that the project timeframe does not slip. The project timeline does not include detailed steps related to data conversion and migration.</p>
<p><b>D.</b> <b><u>User Experience</u></b> <i>Particular attention will be paid to evidence of successful past performance. Success of may be determined by contacting references.</i></p>	<p>The proposal demonstrates excellent support, training and customer service through consistency in user interface and functionality; intuitive and efficient user experience (no duplicate information requests, auto-population to other screens, information is derived and inferred from other responses where possible to avoid duplication or incongruence, and includes data quality warnings); and thorough user interface documentation, including all parts of the system from database administration to front-end experience. Additionally, the proposed HMIS supports usability on tablets and other mobile devices.</p>	<p>The proposal demonstrates support, training and customer service through consistency in user interface and functionality; intuitive and efficient user experience (no duplicate information requests, auto-population to other screens, information is derived and inferred from other responses where possible to avoid duplication or incongruence, and includes data quality warnings); and user interface documentation, including all parts of the system from database administration to front-end experience.</p>	<p>The proposal demonstrates only partial compliance with the following requirements: consistency in user interface and functionality; intuitive and efficient user experience (no duplicate information requests, auto-population to other screens, information is derived and inferred from other responses where possible to avoid duplication or incongruence, and includes data quality warnings); and user interface documentation, including all parts of the system from database administration to front-end experience.</p>

*Evaluation Criteria continues on the following page.*

	Highly Advantageous	Advantageous	Not Advantageous
<p><b>E.</b> <b><u>Support, Training and Customer Service</u></b> <i>Particular attention will be paid to the extent to which customer support is available and effective.</i></p>	<p>The proposal includes an excellent description that provides the highest assurance of the proposer’s ability to meet the following requirements of the scope of services: provision of technical documentation (data dictionary, reporting module guide, database design and navigation, workflow guidance, user manuals); online customer support center with capacity to report issues and track bugs; “Train the Trainer” modules; and quality assurance protocols related to every software upgrade, release or other system change.</p>	<p>The proposal includes a good description that provides a high level of assurance of the proposer’s ability to meet the following requirements of the scope of services: provision of technical documentation (data dictionary, reporting module guide, database design and navigation, workflow guidance, user manuals); online customer support center with capacity to report issues and track bugs; “Train the Trainer” modules; and quality assurance protocols related to every software upgrade, release or other system change.</p>	<p>The proposal includes an incomplete description that provides a low level of assurance of the proposer’s ability to meet the following requirements of the scope of services: provision of technical documentation (data dictionary, reporting module guide, database design and navigation, workflow guidance, user manuals); online customer support center with capacity to report issues and track bugs; “Train the Trainer” modules; and quality assurance protocols related to every software upgrade, release or other system change.</p>
<p><b>G.</b> <b><u>Software Demonstration</u></b> <i>Particular attention will be paid to the alignment and usability of the system.</i></p>	<p>The software demonstration indicates full alignment with local priorities and requirements as defined in the RFP, including clear compliance with HUD standards; intuitive and efficient workflow for end users; effective import/upload functionality; and robust and user friendly reporting functionality. Additionally, the software demonstration shows a clear, well-designed, and flexible platform that includes opportunities for customization beyond the minimum HUD requirements</p>	<p>The software demonstration indicates full alignment with local priorities and requirements as defined in the RFP, including clear compliance with HUD standards; intuitive and efficient workflow for end users; effective import/upload functionality; and robust and user friendly reporting functionality.</p>	<p>The software demonstration indicates partial alignment with local priorities and requirements as defined in the RFP, but does not meet all of the following requirements: clear compliance with HUD standards; intuitive and efficient workflow for end users; effective import/upload functionality; and robust and user friendly reporting functionality.</p>

*Evaluation Criteria continues on the following page.*

	Highly Advantageous	Advantageous	Not Advantageous
<p><b>H.</b> <b><u>Quality of References</u></b> <i>Particular attention will be paid to the extent to which the references shared positive feedback in noted areas.</i></p>	<p>Each of the three references contacted commented substantively and positively on their experiences with the proposer in the following areas: responsiveness to customer service requests, high quality staff, successful data conversion experience, and knowledge of HUD HMIS standards.</p>	<p>Two of the three references contacted commented substantively and positively on their experiences with the proposer in the following areas: responsiveness to customer service requests, high quality staff, successful data conversion experience, and knowledge of HUD HMIS standards.</p>	<p>Only one of the three references contacted commented substantively and positively on their experiences with the proposer in the following areas: responsiveness to customer service requests, high quality staff, successful data conversion experience, and knowledge of HUD HMIS standards.</p>
<p><b>I.</b> <b><u>Coordinated Entry and Prioritization</u></b> <i>Particular attention will be paid to the functionality of software to support and enhance coordinated entry in the CoC.</i></p>	<p>The proposal comprehensively demonstrates that the HMIS software has the functionality to successfully support the New Bedford CoC's coordinated entry system and successfully meets each of the four elements noted in the Scope of Services Section H of this RFP.</p>	<p>The proposal demonstrates that the HMIS software has the functionality to support the New Bedford CoC's coordinated entry system and successfully meets most of the elements noted in the Scope of Services Section H of this RFP.</p>	<p>The proposal demonstrates that the HMIS software has the functionality to support a coordinated entry system and can meet some of the elements noted in the Scope of Services Section H of this RFP.</p>

**DEADLINE**

**Deadline for submission:**

Friday, August 18, 2017 at 2:00PM

Department of Planning, Housing and Community Development  
608 Pleasant Street  
New Bedford MA 02740

**CONSULTANT SERVICES :: COVER SHEET**

<b>Name of Proposer:</b>	<b>Contact Individual:</b>
<b>Address:</b>	
<b>Phone #:</b>	<b>Alternate Phone #:</b>
<b>E-mail Address:</b>	<b>Social Security / Federal Tax ID number:</b>
<b>Authorized Signature:</b>	<b>Date:</b>

**PRICE PROPOSAL FORM**

Provide a total not-to-exceed fixed fee. The total funding available for this contact shall be available on an annual basis, extendable annually, subject to HUD funding and by mutual agreement of the vendor and city.

The City cannot award a contract for services in excess of this amount. The City seeks proposals that demonstrate maximum value, innovation, effectiveness, and total work to be performed within the funding available.

I, \_\_\_\_\_, propose to provide the services detailed in the attached Scope of Services for the following proposal price:

\$ \_\_\_\_\_ lump sum fee.

This proposal shall remain in effect for sixty (60) days.

**Detailed Cost Breakdown:**

**SCOPE OF WORK**

Specific tasks to be undertaken by the selected HMIS vendor shall include, at a minimum:

TASKS	PRICE
A. <b>General Tasks</b>	
B. <b>Regulatory Compliance</b>	
C. <b>Security and Privacy</b>	
D. <b>Core Functionality</b>	
E. <b>Support, Training and Customer Service</b>	
F. <b>Data Imports and Integration</b>	
G. <b>Reporting and Performance Measurement</b>	
H. <b>Coordinated Entry and Prioritization</b>	
<b>TOTAL</b>	<b>\$</b>

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of person signing bid or proposal

\_\_\_\_\_  
Name of Business

**CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of person signing bid or proposal

\_\_\_\_\_  
Name of Business

**STATEMENT OF TAX COMPLIANCE**

Pursuant to any local, state, or federal laws, I hereby certify under penalties of perjury that I, to the best of my knowledge and belief, have complied with all laws and obligations relating to governmental tax liabilities.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of person signing bid or proposal

\_\_\_\_\_  
Name of Business