Request for Proposals

**HOMELESS MANAGEMENT INFORMATION SYSTEM (HMIS)
LEAD AGENCY**

For the
BAKERSFIELD/KERN CONTINUUM OF CARE (CA-604)
On behalf of the
Bakersfield – Kern Regional Homeless Collaborative

The Bakersfield – Kern Regional Homeless Collaborative (BKRHC) is seeking proposals from interested applicants to become the HMIS Lead Agency for the Bakersfield/Kern Continuum of Care (CoC) in Kern County's geographic area. All proposals will be evaluated by a seven (7) member review panel team consisting of members from the City of Bakersfield, County of Kern, CoC, CES lead, HMIS lead, and two (2) at large members using scoring criteria developed by the CoC. The RFP can be found on the BKRHC website at bkrhc.org or by contacting Dr. Anna Laven, Executive Director of the BKRHC, at the email address listed below.

The CoC will have the final decision and notification to successful applicant completed by **April 14, 2023**. The CoC reserves the right, at its sole discretion, to not select any of the submitted proposals should it find sufficient cause.

RESPONSE DEADLINE AND ADDITIONAL INFORMATION:
- All applications must be submitted electronically via email to Destiny Reveles at coordinator@bkrhc.org and CC Anna Laven at anna.laven@bkrhc.org.
- All applications are due by **5PM – Tuesday, February 28, 2023**.
- For receipt of delivery, please ensure that you include delivery and read receipts for your proposal submission.
- Please submit RFP questions to Dr. Anna Laven.

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Section I – Introduction

Eligibility
For profit and non-profit organizations, local and state government entities are eligible to apply.

Statement of Purpose
This Request for Proposal (RFP) aims to obtain proposals from eligible and qualified applicants to act on behalf of the Bakersfield/Kern Continuum of Care (CoC / CA-604) as Lead Agency to oversee, administer, and maintain the Homeless Management Information System (HMIS). The Bakersfield/Kern CoC Governing Board will work with applicants determined to be the most qualified based on the review criteria found on Section II – D (page 10).

HMIS is a requirement for all federally funded homeless service providers with the exception of domestic violence service providers. HUD requires domestic violence service providers to use a comparable system with de-identified, aggregate data provided to the CoC. HMIS acts as a centralized database to capture community-wide data on homeless populations and services provided. HMIS data is used and analyzed to generate reports for homeless service providers, funding agencies, and local/state/federal government. Data is also used to identify and determine any trends within the CoC and homeless system.

A qualified applicant will have experience, familiarity, or working knowledge of homeless service program types including, but not limited to, permanent supportive housing, rapid rehousing, transitional housing, emergency shelter services, street outreach, diversion and prevention, coordinated entry system, and support services. Knowledge for the qualified applicant will also include familiarity with homeless populations including veterans, chronically homeless, youth, families, the elderly and those with intensive medical and behavioral health needs. Knowledge or experience working with different federal, State and local grant types. The HMIS lead agency will have experience administering an HMIS database or similar system, completing quality control checks, performing systems security, and development and/or maintenance of new or existing policies and procedures. The lead agency will also have an understanding of HMIS data and technical standards, HUD regulations, and funding agency reporting requirements as it pertains to HMIS data.

All applications will be reviewed by a seven (7) member, non-conflicted review panel as directed by the CoC's Governing Board. This review panel will consist of individuals from the City of Bakersfield, County of Kern, CoC, CES lead, HMIS lead, and two (2) at large members who are familiar with activities undertaken by the CoC. The review panel will utilize the scoring matrix as described in Section E (page 10 – 11) of the RFP.

HMIS system administration is pursuant to HUD regulations. The HMIS lead agency will administer the system and work collaboratively with the CoC, however, the CoC serves as the ultimate decision-making body regarding HMIS.

Homeless Management Information System

Homeless Management Information System (HMIS) is a local information system required for data entry and centralized information storage of individuals utilizing the homeless system within any CoC. The system allows communities within their respective jurisdictions to obtain an unduplicated count of all persons served by HMIS-participating homeless programs. HMIS provides information on individuals and families enrolled in programs, services accessed, and can be used to assist in homeless system evaluation and effectiveness. Data provided by the HMIS allows for informed policy review and recommendations at the local, state, and federal levels.

HMIS began its development in the late 1990s and a mandate by Congress with the amended HEARTH Act enacted into law on May 20, 2009, required each Continuum of Care to utilize an HMIS and provide information on HMIS software to ensure that data collection and reporting compliance was being met. The U.S. Department of Housing and Urban Development (HUD) released the original HMIS Data and Technical Standards in July 2004 and regularly updates HMIS reference and regulatory documents for CoCs to address any additional mandates or changes to meet program or reporting requirements.

Each HUD CoC is responsible for selection and designation of an HMIS software vendor as well as an HMIS lead agency. Federally funded agencies are required to participate in HMIS at a minimum per HUD, but non-federally funded agencies are encouraged to participate as well. Under the Violence Against Women Act, domestic violence (DV) service providers are prohibited from entering data into HMIS and are required by HUD to utilize a comparable information system and share their aggregated, de-identified data with the CoC.

Per HUD, the HMIS software "must be able to collect all the data elements defined within these HMIS Data Standards, support the system logic identified in the HMIS Data Dictionary, and ensure that the visibility of data elements is appropriate to the Project Type and Federal Partner Funding Sources for any given project." (*source California Continuums of Care and Homeless Information Management System (HMIS) Vendors: Who They Are and Next Steps – https://homelessstrategy.com/california-continuums-of-care-and-homeless-management-information-system-hmis-vendors-who-they-are-and-next-steps/*)

Bakersfield/Kern Continuum of Care (CA-604)

The Bakersfield/Kern Continuum of Care (CoC / CA-604) is a HUD designated continuum of care serving the Kern County geographic region. This region encompasses approximately 8163 square miles and includes McKittrick and Taft along its western borders, Delano at its northern border, Ridgecrest along the eastern edge, and Frazier Park and Lebec at the southern end as well as all of the cities found within the county. Bakersfield is considered the metropolitan location within the CoC, while all other outlying areas are considered rural.

CA-604 utilizes Bitfocus Clarity Human Services as its HMIS software vendor. Currently, Kern Behavioral Health and Recovery Services (KernBHRS) acts as the HMIS lead agency for the CoC.

System support is provided to the CoC by the HMIS Committee, BKRHC staff, service providers, City/County partners, and other stakeholders.

Bakersfield-Kern Regional Homeless Collaborative (BKRHC)

The Bakersfield-Kern Regional Homeless Collaborative, or BKRHC or "collaborative", is an independent 501(c)3 non-profit organization that acts as the collaborative applicant and fiscal agent for the CoC and partners with local, state, and federal stakeholders to reduce homelessness in Kern County. Under the direction of the CoC Executive and Governing Boards, the BKRHC provides technical assistance, strategic planning, program coordination, and support within the CoC to provide resources and stability for those organizations assisting individuals experiencing homelessness in achieving or maintaining permanent housing.

Section II – Proposal Preparation

A – PROJECT SCOPE OF SERVICES

The information listed below constitutes the minimum requirements for operating the Bakersfield/Kern CoC's HMIS.

The selected applicant will be required to deliver the following to the Bakersfield/Kern CoC:

HMIS LEAD RESPONSIBILITIES

Oversight and planning

- Coordinate HMIS activities as finalized by the Bakersfield/Kern CoC Governing Board
- Update any HMIS documents
- Ensure HMIS compliance for all programs
- Ensure HMIS software compliance
- Anticipate, evaluate, and provide recommendations on funding and staffing needs to support operations as HMIS grows or changes
- Work closely with software vendor to maintain system security and operability.
- Work with Federal, State and local government to add agreements, programs and create reports in HMIS.
- Ensure one person within the appointed organization serves as the HMIS Lead

HMIS project administration

- HMIS project management
- Research, manage and apply for necessary grant opportunities to fund HMIS operations
- Complete CoC Planning Grant (HMIS)
- Complete LOI, HUD NOFO, and HMIS grant project applications
- Provide agency specific custom reports for new grants and existing grants renewal.
- Manage and coordinate licensing for new and existing agencies

- Maintain Agency agreements
- Maintain end user agreements
- Manage software vendor payments
- Develop and manage HMIS budget
- HMIS project staffing
- Maintain data sharing documentation, agreements, or MOUs
- Work with agency end users to develop process flow / standard work documents.

Policies and procedures

- Develop, maintain, or update data and system security protocols
- Develop, maintain, or update HMIS policies and procedures
- Develop, maintain, or update HMIS data release protocol
- Develop, maintain, or update HMIS privacy policy
- Develop, maintain, or update HMIS data quality plan
- Develop, maintain, or update HMIS training manual
- Develop, Maintain or update HMIS data collection PDF forms
- Develop, maintain, or update HMIS protocols for healthcare data exchange
- Annual review of HMIS policies and agreements.

Monitoring

- Ensure individual agency HMIS participation for each grant funded project
- Monitor data quality
- Enforce system security
- Monitor agency participation
- Provide monitoring reports to CoC
- Provide consultation and reports to participating programs for related projects
- Work closely with participating agencies to ensure completeness, accuracy, and consistency of data.
- Run biweekly agency license utilization report to ensure licenses are being actively utilized.

Administration and support

- Monitor systems administration
- Identify and review any HUD-required reporting needs
- Review or submit System Performance Measure reporting to CoC
- Review or submit Longitudinal System Analysis reporting to CoC

Board and committee responsibilities

- Participation and engage in the BKRHC Governing Board as a member occupying the HMIS operator seat
- Lead and support HMIS Committee

HMIS ADMINISTRATION AND SUPPORT RESPONSIBILITIES
Items listed below are administered by the HMIS lead or through internal CoC support.

System administration
- HMIS operations and maintenance – can coordinate capacity for IT support
- Track and resolve HMIS issues
- Track and implement any HMIS updates provided by vendor
- Local customization and configuration of the HMIS implementation to meet local needs
- Add, edit, remove or maintain new programs, services, assessments and program templates to align with end user needs.
- Configure different access levels for agency users and agency data leads/ super users.
- Configure agency specific sharing, visibility and privacy settings.
- Develop import/ export capability.
- Attend HUD trainings and webinars.
- Attend software vendor trainings and webinars.

Training and technical support
- New agency/project set up
- Provide help desk support for end users
- Configure and maintain HMIS training site.
- Provide HMIS training to new and continuing users or agencies
- Provide policies and procedures training
- Provide HMIS privacy and security standards trainings.
- Provide 'Train the Trainer' trainings for agency data leads/ superusers
- Add/ remove users, reset passwords for end users.
- Provide Coordinated Entry support by adding/ Maintaining community queue(s) and referral system in HMIS.

Reporting
- Provide CoC and Notice of Funding Opportunity (NOFO) reporting
- Provide custom reporting support
- Compile and provide reports but not limited to Annual Performance Report (APR), Data Quality, Emergency Solutions Grant-COVID, California State Homeless Data Integration System (HDIS), Planning and Performance committee charts, System Performance Measure reports
- Work with HUD liaison and agency end users for Longitudinal Systems Analysis, Housing Inventory Count and Point In Time data clean up and submission.
- Work with State for Project Room key and HDIS data upload.
- Import Veteran's Affairs-HOMES data in to HMIS
- Compile and provide other CoC-approved reports

- Submit HMIS grant APR to HUD
- Work with agency end users for data entry issues and clean up.
- Provide reporting specific to de-identified clients and related projects

HMIS Software Vendor

Bitfocus is the current software vendor for the Bakersfield/Kern CoC's HMIS (Clarity Human Services). No recommendations for a change in vendor are being considered at this time.

Budget Considerations

HMIS administration budget must be considered by the CoC as well as the HMIS lead agency. Historically, HMIS funding has been procured through annual monies, primarily from HUD's Continuum of Care Planning Grant as well as other funding sources. It is not the HMIS lead agency's sole responsibility to procure HMIS funding and work will be conducted collaboratively between the lead agency and the CoC to determine funding sources and the application to those sources. Every effort should be made to plan for sustainable HMIS funding that not only meets the needs to support staffing and operations of the HMIS but also anticipates growth or change to the system.

Healthcare and Homelessness

With an increased focus on healthcare and homelessness, particularly as part of grant applications and reporting, there is a greater need for data sharing between the CoC and healthcare service providers (HSPs) within Kern County. Every consideration should be made to create and implement a bilateral data exchange between the CoC and HSPs which follows HMIS quality control and security specifications as well as required specifications for data exchange from other participating entities.

B – PROPOSAL DETAILS

Applicants must provide clear, complete, and concise responses for each of the application elements.

Organizational Overview and Documentation

Please provide the organization's legal, complete, and accurate information including name, address, telephone number, and primary contact's name and email address for the application. Please provide organizational documents, federal employer identification number, and standing with the state.

Organizational Capacity (30 points)

The successful applicant must possess knowledge of and technical expertise with:

Strategic Planning and Oversight (10 points)
- Please describe your experience with strategic planning and how it has been used to direct and implement achievement of goals, growth and navigating challenges.
- Please describe your experience and approach to stakeholder engagement and working collaboratively with various service providers within and outside of the CoC.
- Please describe your experience working with social services organizations that provide direct homeless services or in a capacity relevant and/or similar to the homeless service system.
- Please describe your experience with coordinated entry systems, including your experience with utilizing HMIS as a complimentary system structure supporting CES.

Project Administration and Management (10 points)
- Please describe your experience with project administration and management.
- Please describe your experience with grant application and administration.
- Please describe your experience managing project budgets.
- Please describe your experience researching and procuring funds (sustainable or otherwise) for program administration.
- Please describe any experience in administering systems similar to HMIS.
- Please describe your experience developing policies and procedures within your organization and across multiple agencies within a collaborative.
- Please describe any experience and your approach to monitoring compliance, conducting quality control checks, and maintaining system security.

Help Desk, Training, and Support (5 points)
- Please describe your experience providing general technical assistance and help desk support for HMIS or a similar system.
- Please describe your experience providing new user and continuing training.
- Please describe how you would work with end users/organizations consisting of a range of staffing capacity and experience levels.
- Please describe how your experience will ensure that system capacity is fully available to meet needs of users and stakeholders.

Reporting (5 points)
- Please describe your experience with grant reporting.
- Please describe your experience with federal reporting and associated standards.
- Please describe your experience with data review and analysis.
- Please describe your experience in planning, developing, implementing, and maintaining public facing data dashboards.

Organizational HMIS Administration Plan (30 points)

Please provide your organization's proposed plan for HMIS administration, including, but not limited to, the following:

- Description of your organization's budget plan for the first year of HMIS administration and the proposed services to be rendered.
- Description of the HMIS transition from Kern Behavioral Health and Recovery Services to your organization. Include staffing responsibilities for this phase and how your transition plan allows for continued HMIS work with the least amount of service disruption.
- Provide proposed plan for research of and application for potential and sustainable funding.
- Provide proposed plan for stakeholder feedback and implementations of process improvements.

Staffing Plan (15 points)

Applicants must provide a staffing plan for HMIS administration, including identification of an HMIS Lead position. The plan must include specific role descriptions with each role's experience level, an organizational chart for HMIS staff, and include information on how this staffing plan will meet deliverables set forth by this request for proposal and contribute to the overall success of the CoC's homeless system as well as HMIS. The staffing plan should also include experience with data analysis and dashboard design. Resumes for individuals included in the staffing plan should also be included as part of the application. Please indicate your organizational workflow for HMIS administration in order to meet CoC-determined outcomes.

Organizational Budget and Financial Resources (15 points)

Please provide your organization's budget and financial resources for HMIS administration along with a comprehensive, annual plan for administering the system, and your organization's plan or processes for maintaining financial records/bookkeeping/auditing related to HMIS administration. The annual plan should include all HMIS administration-related line item costs including staffing, software, and any other administrative costs as allowed by funding source.

References (10 points)

Applicants must provide a minimum of three (3) letters of reference, which includes current contact details, from organizations which the applicant has provided similar services within the past two (2) years.

C – PROPOSAL STRUCTURE

Each applicant is required to submit a complete RFP for review consideration and provide attestation to the accuracy and completeness of their submission. Applicants must follow the guidelines as set forth in the RFP including proper document formatting, meeting deadlines, and required proposal documents.

The Bakersfield/Kern CoC expects submitted proposals to adhere to standards set forth in this RFP. Submissions not organized accordingly will be considered invalid at the discretion of the review panel.

Section	Subject	Maximum Page Limit
1	Organizational Overview and Documentation	Two (2) pages
2	Organizational Capacity	Five (5) pages
3	Organization HMIS Administration Plan	Five (5) pages
4	Staffing Plan	Two (2) pages
5	Organization Budget and Financial Resources	Two (2) pages
6	References	One (1) page per reference

D – EVALUATION CRITERIA

Proposal evaluation will be conducted using several factors, including, but not limited to, the following:

- Stakeholder engagement and strategic planning
- Familiarity with homeless services, providers, and homeless systems, including coordinated entry systems
- Project management
- Funding strategy development, implementation, and budgeting
- Experience with administration of HMIS or a similar system
- Experience creating and updating policies and procedures
- Experience performing quality control and system security inspections
- Experience with systems help desk support and technical assistance
- Experience with reporting, including HUD mandated and grant reporting
- Experience or working knowledge of HMIS data standards
- Organizational capacity to provide system support
- Organizational capacity to provide lead role in system administration
- Organizational capacity to act as lead for the CoC's HMIS Committee

E – SCORING MATRIX

A successful and complete proposal will be scored based on the following scoring matrix.

Scoring Criteria	Max Points	Notes
Organizational overview and documentation	N/A	No points allotted.

Scoring Criteria (cont.)	Max Points	Notes
Organizational capacity	30	Point allocations divided by criteria subsections.
Organizational HMIS administration plan	30	
Staffing plan	15	
Operational budget and financial resources	15	
References	10	
Total Points	**100**	

F – TIMELINE OF APPLICATION TO FINAL REVIEW

The complete timeline from RFP release to finalization can be found below. Dates may be amended as necessary by the CoC. Notifications will be provided to applicants should any changes be made.

Activity	Date
HMIS Lead Agency RFP released	January 30, 2023
Application submission	January 30 – February 28, 2023
Applications due	February 28, 2023
Applicant notifications of successful submission	March 3, 2023
Non-conflicted Review Panel reviews applications	March 13 – 14, 2023
Review panel report submitted to BKRHC for review	March 20, 2023
Review panel report submitted to BKRHC Governing Board	March 29, 2023
Finalization of tentative HMIS Lead Agency approved by BKRHC Governing Board	March 29, 2023
Governing Board-approved report presented to BKRHC Executive Board	April 13, 2023
Notification to successful applicant	April 14, 2023

APPENDIX – DEFINITIONS

Applicant
Any entity or organization submitting a proposal to this RFP, also known as respondent.

Annual Performance Reports
Recipients of HUD Continuum of Care (CoC) funding (e.g., Supportive Housing Program, Shelter Plus Care, Section 8 Moderate Rehabilitation Single Room Occupancy Program, CoC Program) are required to submit an Annual Performance Report (APR) electronically to HUD every operating year.

Bakersfield/Kern Continuum of Care (CA-604)
The Bakersfield/Kern Continuum of Care (CA-604) is the HUD designated CoC covering the 8163 square mile geographic area that is Kern County.

Bakersfield-Kern Regional Homeless Collaborative (BKRHC)
The primary entity charged with responsibility for overseeing CoC functions as mandated by HUD, including submission of the annual CoC Notice of Funding Opportunity (NOFO), HMIS oversight, Point In Time Count, Housing Inventory Chart, as well as other annual reports.

Collaborative Applicant
The Collaborative Applicant for the Bakersfield/Kern Continuum of Care (CA-604) is the Bakersfield-Kern Regional Homeless Collaborative (BKRHC). The BKRHC submits the annual HUD CoC Notice of Funding Opportunity (NOFO) application on behalf of the CoC.

Continuum of Care (CoC) Program Interim Rule
The rule that establishes the regulations for the Continuum of Care Program and mandates regulatory implementation of the Continuum of Care Program and its planning process.

Emergency Solutions Grant-COVID
Recipients of HUD funding received through the Emergency Solutions Grant (ESG) Program are required to submit a CAPER to HUD annually.

Executive Board
The nine (9) member body of the BKRHC tasked with fiduciary and legal responsibility for CoC operations.

Final contract
The finalized contract that is negotiated and entered into between the Bakersfield-Kern Regional Homeless Collaborative on behalf of the Bakersfield/Kern Continuum of Care and the successful applicant awarded under this RFP.

Governing Board

The 21-member body of the BKRHC tasked with overseeing work conducted by the CoC.

HEARTH Act
The Homeless Emergency Assistance and Rapid Transition to Housing Act of 2009, signed into law on May 20, 2009, codifies into law the Continuum of Care planning process and amends the existing McKinney-Vento Act by expanding homeless prevention, placing more emphasis on rapid re-housing, emphasizes creation of permanent supportive housing for families and chronically homeless individuals, and provides resources and additional guidance for rural communities.

Homeless Data Integration System (HDIS)
The HDIS is a statewide data warehouse of data from the 44 local homelessness response systems in California.

Homeless Management Information System (HMIS)
The community-wide database mandated by the HEARTH Act for all programs funded by the U.S. Department of Housing and Urban Development homeless assistance grants (e.g., Continuum of Care Program and Emergency Solutions Grant Program).

Housing and Urban Development (HUD)
The U.S. Department that funds low-income and affordable housing initiatives, including the McKinney-Vento Homeless Assistance Act, through the HUD Continuum of Care Program and Emergency Solutions Grant Program.

HUD -NOFO
U.S. Department of Housing and Urban department -Notice of Funding Opportunity.

Housing Inventory Chart (HIC)
An annual, single day count of all homeless beds available within a CoC, which coincides with the Point-In-Time Count.

Longitudinal Systems Analysis
The Longitudinal Systems Analysis (LSA) report, produced from a CoC's Homelessness Management Information System (HMIS) and submitted annually to HUD via the HDX 2.0, provides HUD and Continuums of Care (CoCs) with critical information about how people experiencing homelessness use their system of care.

McKinney-Vento Homeless Assistance Act
A federal law that funds homeless service programs and ensures educational rights and protections for children and youth experiencing homelessness. The Act also provides definitions for homeless children and youth.

Point In Time (PIT) Count
The Point-in-Time (PIT) count is a count of sheltered and unsheltered people experiencing homelessness on a single night in January.

The annual, single day count of sheltered and unsheltered individuals experiencing homelessness in each CoC's geographical jurisdiction. The count coincides with the Housing Inventory Chart reporting.

Proposal
The set of complete and accurate responses including any supporting documents or materials submitted by interested applicants as a result of this RFP.

Respondent
Any entity or organization submitting a proposal to this RFP, also known as applicant.

Review Panel
The seven (7) member, non-conflicted panel charged with evaluation and scoring of all complete and accurate submissions. Members include individuals from the City of Bakersfield, County of Kern, CoC, CES lead, HMIS lead and two (2) at large members.

Scope of work
The instructions and requirements as set forth in this RFP, including supplementary information amended to this RFP subsequent to the RFP's original distribution.