Request for Proposals (RFP) for Statewide Data Warehouse Development and Implementation for Texas Homeless Data Sharing Network (THDSN)

A. Introduction and Purpose

The development and use of a statewide homelessness Data Warehouse is intended, at minimum, to accomplish the following goals and objectives:

- Maximize the use of anonymous and de-identified data for reporting and research purposes as well as personal and identifiable data for reporting and care coordination purposes
- Standardize data sharing policies, procedures, and practices across CoC geographies to increase data security and decrease unauthorized uses and disclosures of client-level data
- Support statewide efforts to use data to allocate resources, secure necessary funding, and connect and leverage existing programs and services across systems of care
- Create an integrated platform that has capacity to import and link client-level data from various state and local systems of care and local homeless programs and serve as a powerful, data driven tool used to inform policy and resourcing decisions

Data sharing through a Data Warehouse will enhance coordination with providers across CoC geographic areas, emergency assistance (EA) systems, other intersecting systems of care and resources (e.g. justice and healthcare sectors). Data sharing will also support improved reporting, planning, and resource allocation strategies at both the local and state levels. Standardized data sharing across Texas will improve how services and housing are accessed by the most vulnerable households, people experiencing and those at-risk of homelessness, leading to improved outcomes and increased efficiencies.

Given these benefits, the Texas Homeless Data Sharing Network (THDSN) is committed to supporting the creation of a statewide homelessness Data Warehouse for HMIS information and adding cross-cutting sector data across other systems of care in the future. This Data Warehouse may be used by CoCs, local homeless providers, state agencies, and other relevant parties for:

- Eligibility determination
- Referral to and coordination of services
- Local, regional, and statewide reporting
- Research and administrative data matching to identify people who are high cost and high needs
- Planning and mapping (e.g. resources and gaps)
- Advocacy and policy recommendations

For example, with a statewide homelessness Data Warehouse…

- A household experiencing homelessness in a hurricane affected area could quickly be identified and the continuation of their housing plan uninterrupted across multiple participating Homeless crisis response systems.
- A CoC could determine if there were any trends in migration by tracking new admissions in shelter and which CoC they were involved with previously.
- Assist communities to address inequity in their housing and homeless systems and examine the biases that produce systemic inequality and are embedded in the collection, production, and reporting of data.
- A homeless services provider could access an individual's use of shelter in different areas of the state in order to establish chronic homeless eligibility and coordinate care more effectively.

B. <u>Background</u>

The mission of the Texas Homeless Network (THN) is to provide solutions to end homelessness in Texas communities through education, resources and advocacy. THN accomplishes this mission by providing support through information, education, training, funding, and technical assistance to agencies and individuals that provide services to the homeless. We know that by working together, we will end homelessness.

While THN has assumed the fiduciary obligation to the THDSN serving as the fiscal administrator and providing administrative support, the THDSN implementation and operation is under the direction of the THDSN Board. The THDSN Board is the decision-making entity driving the development, implementation, and ongoing operation of the THDSN. The THDSN Board is responsible for the development of protocols that govern usage of the Data Sharing Network, including user permissions, end user agreements, release of information and any data sharing agreements or specific to data maintained within the network that may be necessary.

C. <u>Scope of Work</u>

<u>Design</u>

THDSN seeks competitive bids to secure a contract for the provision and maintenance of a customized Data Warehouse for both historical and future data related to systems impacting homelessness across the state. As the first step in the implementation, the THDSN Board will work with CoCs to achieve consensus on the design and scope of the warehouse. The first phase of the warehouse will aggregate HMIS data from participating CoCs. At a minimum, the warehouse will be designed to:

- Export HMIS and systems of care data in a standard CSV file format on a regular basis (see attachment A for a list of HMIS data elements to be shared);
- De-duplicate data and identify quality issues; and
- Control ability to view and use information by establishing different levels of access.

The Data Warehouse has an opportunity to leverage existing data collection efforts and any new forms or policies (such as standard Release of Information and data privacy protocols) will be developed and approved by the THDSN Board, which includes input from participating CoCs.

As conceptualized, the Data Warehouse will receive identifiable data, ensure it is not duplicative, and make merged data available in two formats:

- Anonymous and de-identified data set to inform policy and planning activities; and
- Personal and identifiable form data set to support care coordination for people accessing services

The warehouse will include safeguards that limit access to data based on the type of agency requesting the data and how the data will be used. For example, general dashboard reports comprising aggregated de-identified data may be made available to the public; more detailed personal and identifiable client-level data will be available to CoCs and contributing agencies where there is a data use agreement for a specific business case in place. To ensure the safety and security of the data and also ensure compliance with all applicable state and federal privacy laws, all CoCs that want to access personal and identifiable client-level data will have to meet specific requirements such as:

- Use of an appropriate Release of Information allowing for this use
- Use standard statewide data sharing protocols
- CoC has clear HMIS oversight structure
- CoC and HMIS Lead participate in THDSN governance development

These examples are not exhaustive; additions or changes may be made at the discretion of the THDSN Board.

System Features, Functions, Administration, and Reporting

The review panel will evaluate the ability to capture, update, share and produce reports related to systems, users, clients, and/or aggregate data at the Continuum of Care level. The system should be able to set different access levels to shared data. The applicants will be evaluated on their ability to export and import data in various formats (e.g. HUD standard format) and integrate data from external sources (e.g. CSV/XML and API). In addition, the ease of use and creation of ad hoc reporting tools, dashboards, third-party reporting tools (e.g. mapping software) and the general flexibility and user interface will be weighed. Timing of report generation capabilities (real, near-real, batch) and data services (e.g. back-ups, data sharing, confidentiality) will be evaluated.

Support, Customer Service and Training

Submissions will also be evaluated on their ability to demonstrate timely, effective, and convenient support to the THDSN Board and designees as determined by the THDSN. This may include help desk availability during operating hours, technical support for HMIS Lead Agency staff and other system administrators, ability to provide tech support for initial implementation, provisions for ongoing system maintenance and updates, and ability to make enhancements for changing needs. Associated training materials and communication plans to support proposed system changes will also be evaluated.

Cost Effectiveness/Budget

Proposals will be evaluated on the feasibility, cost-effectiveness, reasonableness, and accuracy of the budget. In addition, proposals will be weighed against comparable warehouse system costs and to other

submissions. Proposed costs should be delineated by what is considered to be standard, an available add-on, or customization of system.

Proposals should include description of organizational capacity to implement the project, a timeline and plan for implementation and budget. Section E includes a scoring rubric and outline for each phase in the selection process.

D. Contract Details

Period of Performance – This contract will go into effect once signed and will be complete after a 12-month term.

Payment, Incentives, and Penalties – This is a project based contract with a maximum budget proposal of $250,000 for the first year. THN has secured $100,000 and anticipates raising an additional $150,000 within the first year of development and implementation. THN has also received City on a Cloud awards in the form of $5,000 in Amazon Web Services (AWS) credit, which may be leveraged for storage and applied to the budget proposal.

Contractual Terms and Conditions – Texas Homeless Network (THN) as fiscal administrator, on behalf of THDSN, reserves the right to issue work orders based on negotiated scope of work and level of effort for all or some of the tasks to be accomplished. THN also may allocate work orders to one or more vendors.

E. Selection Process

THDSN will use a phased process for the final selection of a qualified vendor to perform stated work:

Phase 1: Threshold Review

Emailed proposals received by the submission deadline will be reviewed by designated representatives of THN and/or THDSN Board to ensure that they meet threshold criteria. Any proposal that does not meet the minimum standards listed below will be excluded from further consideration.

Criteria	Score
Electronic proposal received on or before deadline	Pass/Fail
All sections of Proposal Template are complete	Pass/Fail
Cost Effectiveness/Budget meets THDSN Data Warehouse budget	Pass/Fail

Phase 2: Proposal Evaluation

In Phase 2, the evaluation panel will score the content of proposals section by section. There are both objective and competitive/subjective elements to scoring in Phase 2. Initial evaluation and comparative review of proposal sections will be based on de-identified copies prepared after Phase 1,

to allow evaluators to assess the content of each individual section neutrally and independent of other sections. The scored areas are listed below.

Criteria	Points
Scope of Services	100
Organizational Capacity	20
Planning and Implementation	20
Budget/Cost Analysis	40
Clarity/Relevance of Proposal Responses	10
References	10
Total	200

Cover letters and full proposals, as submitted, will be considered prior to finalizing scores in other areas.

The Board may request additional information during Phase 2 to ensure an accurate assessment. Regardless of overall score, there are pass/fail elements involved in Phase 2. For example, proposals may not be considered in Phase 3 if:

- Assessment indicates that the proposed solution cannot meet the Board's needs.
- The amount of customization required to meet the Board's needs, based on the narrative responses in the project plan, is substantially greater than other applicants and/or presents an unacceptable risk to meeting a target date for implementation or meeting overall needs; or
- The cost analysis exceeds the overall THDSN budget.

All Phase 2 applicants will be notified of their proposal status by email at the completion of the phase. Applicants whose proposals have been eliminated will be provided with a reason and may have an opportunity to receive feedback on the evaluation once a final decision has been made.

Phase 3: Demonstration and Final Selection

Based on the proposals, up to 3 applicants may be invited to schedule a demonstration to present to the evaluation panel. In general, this presentation is expected to include:

- Organizational capacity, software functionality, and overall ability to meet requirements.
- User experience for ad hoc reporting and data visualization tools
- User levels and securities for data input versus data access
- Seamless integration across multiple systems and data sources

Applicants should be prepared to demonstrate any aspect of functionality described in the proposal. If the proposal includes custom development, applicant may be asked to present sketches, wireframe mockups, diagrams, etc. Any travel costs associated with an in-person demonstration will be incurred by the applicant.

Phase 3 scoring will focus on the software, data integration and access.

Scoring Area	Points
Overall Quality of Presentation/Content	30
User Experience	30
Configurability/Admin User Experience	20
Demonstration Consistent with Proposal	10
THDSN Steering Committee Feedback and Reference Checks	10
Total	**100**

THN will initiate contract negotiations with the highest ranked application. If contract negotiations are unsuccessful, THN will enter into a subsequent negotiation with the next highest short-listed vendor.

F. Selection Schedule

The anticipated procurement schedule is as follows:

RFP Event	Event Date
RFP Issued	2/6/2020
Deadline to Submit Questions	2/14/2020
Answers to Questions Posted	2/18/2020
Application Submission Deadline	2/21/2020
In Person Interview (if necessary)	3/2/2020
Applicant Identified for Contract Negotiations	3/7/2020
Contract in Place	3/14/2020

G. Submission Requirements

For consideration, proposals must be submitted as follows:

- Proposals must include a brief cover letter to the attention of the THDSN Board
- Proposals must include a brief narrative that addresses how the Scope of Work, as outlined in Section C, will be accomplished.
- Proposals must include the organizational capacity, qualifications of the applicant and include the resume of the principal resource development professional that will provide direct service

for this project.

- Proposals must clearly outline the projected responsibilities of both THDSN and the selected firm.
- Project budget as well as all costs payable by THN on behalf of THDSN must be clearly defined, including billing requirements, as outlined in the Scope of Work, Cost Effectiveness/Budget section.
- Minimum of three (3) references where the bidder has successfully performed similar services.
- Proposals must be submitted by 4:00 p.m. CST on February 21, 2020.
- Proposals not meeting the criteria outlined in the RFP will not be considered. Proposals should be emailed to:

  Eric Samuels, President/CEO, Texas Homeless Network
  Eric@thn.org

ATTACHMENT A

LIST OF SHARED HMIS DATA ELEMENTS:

Reports using anonymous and de-identified data will utilize the following standard HUD HMIS data elements for reporting purposes:

All HUD HMIS project descriptor data elements (2.1 – 2.8);

- 2.1 Organization Identifiers
- 2.2 Project Identifiers
- 2.3 Continuum of Care Code
- 2.4 Project Type
- 2.5 Method for Tracking Emergency Shelter Utilization
- 2.6 Federal Partner Funding Sources
- 2.7 Bed and Unit Inventory Information
- 2.8 Additional Project Information

HUD HMIS universal identifier elements that describe demographics (3.4 – 3.7);

- 3.1 Name
- 3.2 Social Security Number
- 3.3 Date of Birth
- 3.4 Race
- 3.5 Ethnicity
- 3.6 Gender
- 3.7 Veteran Status

All HUD HMIS universal project stay elements (3.8 – 3.917); and

- 3.8 Disabling Condition
- 3.10 Project Start Date
- 3.11 Project Exit Date
- 3.12 Destination
- 3.15 Relationship to Head of Household
- 3.16 Client Location
- 3.20 Housing Move-in Date
- 3.917 Living Situation

All HUD HMIS program specific data elements (4.2 – 4.18).

- 4.2 Income and Sources
- 4.3 Non-Cash Benefits
- 4.4 Health Insurance
- 4.5 Physical Disability
- 4.6 Developmental Disability
- 4.7 Chronic Health Condition
- 4.8 HIV/AIDS
- 4.9 Mental Health Problem
- 4.10 Substance Abuse
- 4.11 Domestic Violence
- 4.12 Contact
- 4.13 Date of Engagement
- 4.14 Bed-Night Date
- 4.18 Housing Assessment Disposition

Reports using personal and identifiable data will utilize the following standard HUD HMIS data elements for reporting and care coordination purposes:

2.1 Organization Identifiers
2.2 Project Identifiers
2.3 Continuum of Care Code
3.1 Name
3.2 Social Security Number
3.3 Date of Birth
3.6 Gender
3.7 Veteran Status
3.8 Disabling Condition
3.10 Project Start Date
3.11 Project End Date
3.12 Destination
3.16 Client Location
4.18 Housing Assessment Disposition
4.43 Last Permanent Address [1]

[1] Zip Code of Last Permanent Address was a Universal Data Element (3.10) until the 2014 HUD HMIS Data Standards but is no longer a Universal Data Element. Last Permanent Address is a current data element for VA SSVF participating projects (V5 Last Permanent Address).