

SAN DIEGO CITY and
COUNTY &
IMPERIAL COUNTY
CONTINUUMS OF
CARE

REQUEST FOR PROPOSAL (RFP)

Homeless Management Information System

RFP Issued – May 17, 2018

Written Questions Deadline – May 31, 2018, 5pm PST

Submission Deadline – June 08, 2018, 2pm PST

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I. DESCRIPTION OF WORK

1. Objective

The Regional Task Force on the Homeless (RTFH) is issuing this Request for Proposal (RFP) to secure web-based Software as a Service (SaaS) for the San Diego City and County & Imperial County Continuums of Care (CoC) Homelessness Management Information System (HMIS).

The goal of the RTFH CoC's HMIS is to maintain a database for the collection, reporting and coordination of homeless client data in effective services and information to achieve housing stability and self-reliance. The goal of this RFP is to acquire SaaS that allows us to provide a high quality, user-friendly, person centered, data collection system that expedites client initial engagement, assessment, intake and housing placements while supporting the analysis of quality information that can be used for program improvement, service planning and reporting.

Current Scope of the RTFH HMIS		
Current Software Provider for CoC HMIS	Homeless Dedicated Provider Only	All Providers
FTE HMIS System Admins User Accounts	7	7
Agency Admins	92	92
User Accounts Created (10/1/2014 to present)	1786	1786
Active User Count (at present)	749	749
Active Agency Count (at present)	84	84
Active Program Count (at present)	295	350
Active Client Count (at present)	160,000	500,000
Unduplicated Clients	160,000	500,000
Service Transaction Count (2017)	160,000	180,000
Client Entry/Exit Count (2017)	60,000	100,000

2. Eligible Applicants

All applicants must meet the following minimum requirements:

- a. At least three years of experience implementing SaaS solutions for HMIS;
- b. At least three years of experience translating federal, state and local grant guidelines and program regulations into software requirements and implementation of software solutions to meet federal, state and local reporting requirements;

- c. At least three years of experience working with private, nonprofit and public entities providing services to persons experiencing homelessness;
- d. At least three years of experience data hosting, data storage, data security, network operations, backup, and uptime, as well as, redundancy of all systems for a large jurisdiction with multiple users in multiple agencies;
- e. Demonstrated success in legacy data migration (import and export) and ongoing data integration (import and export) across multiple software solutions using the XML and CSV schema mandated by HUD;
- f. Demonstrated ability to collect and generate all HUD required Universal and Program Specific Data Elements and Reports;
- g. Meet HUD and local CoC compliance requirements of current HMIS data standards and regulations regarding privacy and confidentiality.

3. Contract Term

The initial term for the contract awarded through this RFP is anticipated to be August, 2018 – July, 2019. RTFH reserves the option to renew the contract awarded through this RFP, for up to four (4) additional years, contingent upon satisfactory contractor performance, availability of funds and community need.

4. Scope of Services

The selected vendor is required to provide the following, unless otherwise specified as “Desired” or “Highly Desired”:

1. System Features

- a. Client intake and update functionality.
 - i. Centralized module independent of program enrollments that records historical changes made to each field and indicates last time intake was updated.
 - ii. Ability to track benefit eligibility and participation. (Desired)
- b. Ability to record and track referral data (type, status, follow up).
- c. Mobile response experience that can leverage device features including geolocation, camera’s (secure document uploads) and touchscreen (e-signature). (Highly Desired)

- d. ID cards and/or biometric scanning technology based intake.
- e. Document and file uploading capability.
- f. Ability to create and modify client assessment forms with weighted scoring.
- g. Ability to match homeless clients and appropriate housing and service resources based upon assessment responses and housing eligibility requirements.
- h. Ability to identify eligibility at the client and project level. (Highly Desired)
- i. Ability to track real time reservations, occupancy and availability of beds and units. (Highly Desired)
- j. Prioritization of clients on Master List/By-Name List, waiting lists, etc.
- k. Safeguards to prevent the creation of duplicate records and built-in duplicate management / merge tool.
- l. Auto exit and default end date functionality.
- m. System alert for annual assessment updates and ROI expiration.
- n. Automatic update of eligibility which are attached to age, veteran status and other elements that change over time.
- o. Batch data functionality. (Highly Desired)
- p. Ability to create anonymous client records for the integration of domestic violence and/or TAY programs into the Coordinated Entry System. (Highly Desired)
- q. Ability to confirm user actions through pop-up messages (e.g., Are you sure you would like to delete this record?).
- r. Ability to communicate via notifications, alerts, messages, and reminders at the system, organization, program, client, and user-level.
- s. Streamlined printing of individual client records. (Highly Desired)
- t. Ability to add multiple program entry/exit history. (Highly Desired)
- u. Assessments/history of services provided. (Highly Desired)

2. Reporting

- a. Ability to separate reporting by contract for multi-funded projects.
- b. Ad hoc reporting functionality that allows users to generate near real-time reports at client, program, agency, and system levels.
- c. Ad hoc reporting functionality that allows users to generate near real-time reports about CES intake data, housing navigation assignment, housing match and housing placement.
- d. Ability to export to standard applications (Excel, Word, PDF, etc.).
- e. Ability to create custom scripts and ability to execute the query in real time.
- f. Ability to schedule and automate report generation.
- g. Ability to drill down to individual client level record from aggregate reports. (Highly Desired)
- h. Protocols for handling report requests that are too burdensome to generate through the user interface (e.g., reports for very high-volume programs, CoC System Performance Measures Report, Program level Performance Measure Reports).
- i. Data visualization tools and/or simple integration with third party data visualization systems to maximize the visibility of key performance indicators. (Highly Desired)
- j. Thorough and continually updated report documentation (including data models, data dictionaries) for standard reports that shows data sources from the database and describes purpose and uses of the report. (Highly Desired)

3. Customer Service

3.1 Installation and Customization

- a. Comprehensive conversion strategy from the existing system including outlining estimated time needed for conversion and verification of data accuracy.
- b. Ability to migrate data across systems on demand without limits on frequency and volume and in HUD standard CSV and XML format.
- c. Coordinate activities related to the implementation and installation of the HMIS.
- d. Process for receiving customer product enhancement requests to drive future software development.

- e. Protocol for receiving, reviewing, and responding to both automated and requested software fixes based on agreed upon service level agreements.
- f. Participation in the HUD HMIS Vendor Work Group and willingness to make required changes within a certain timeframe.

3.2 Training and Support

- a. Train-the-trainer service to RTFH HMIS staff as part of the installation process.
- b. Provide on-going technical support for the duration of the contract.
- c. Provide after-hours emergency support. (Desired)
- d. Provide training and support materials for user navigation.
- e. User Acceptance Test (UAT) procedures and test environment for every upgrade, patch, enhancement, and other system changes.
- f. Designated training environment.
- g. Integrated ticketing system for users and system administrators.
- h. Well-coordinated patch release timing, content, communication, and testing.
- i. Ability to receive feedback via user forums. (Desired)

4. System Administration

4.1 Data Hosting, Disaster Recovery, Security, Technical Support and Maintenance

- a. Provide web-based data hosting, security, data backup procedures and off-site storage, recovery/restorative procedures, major outage procedures and 24 X 7 emergency technical support for the duration of the contract.
- b. SOAP/XML DataStream procedures exist to create a near real-time link between the live Database and other applications.
- c. API capability. (Highly Desired)
- d. Provide technical safeguards to ensure highest level of client confidentiality, data encryption and authentication, role-based security, audit trail, event monitoring, restrict user level access when appropriate, flexible data sharing while ensuring client data privacy and confidentiality. (Compliance with HIPPA, 42 CFR, client consent, ROI, etc.)

4.2 Local Administrator Functions

- a. Ability to map multiple funder contracts to programs and to track performance outcomes separately.
- b. Program, performance target, and contract configuration capability.
- c. Data merge/de-duplication capability.
- d. Allow for flexible multi-funding project and service customization.
- e. Open/close functionality for client and program records.
- f. User management for accounts(s) access and password – self-service.
- g. Ability to partition the view/access of data by user, program, and organization.
- h. Ability to create and manage rules for data elements collected, including the ability to hide or mask individual project-specific client data elements.
- i. Ability to create and manage custom forms, workflows and assessments including conditional and/or jump logic and re-order data fields and pages.
- j. Ability to access a live data warehouse that includes all tables and views that can be queried on demand. (Desired)
- k. Ability to communicate via notifications, alerts, messages, and reminders at the system, organization, program, client, and user-level.
- l. Ability to configure user page and data field views. (Desired)

II. DATES AND DEADLINES

1. RFP Timeline

2018 HMIS RFP Projected Timeline	
Release of RFP	May 17, 2018
Mandatory bidders conference/ webinar	May 24, 2018
Deadline for submitting written questions	May 31, 2018
Proposal Submission Deadline	June 08, 2018
Threshold Review Results, Vendor Demos	June 11 - 22, 2018
Quality Review Results	June 27, 2018
Vendor selection	June 29, 2018
Funding Recommendations, Contract Review	July 27, 2018
Latest Contract Start Date	Aug. 3, 2018
HMIS Migration	Aug.-Oct. 2018

2. Questions from Proposers

Proposers are encouraged, but not required to submit any questions in writing at least one day prior to the bidders' conference. You may direct your questions regarding this RFP to admin@rtfhsd.org with the subject line, "2018 HMIS RFP – Q&A". Please be sure to include your name, job title, the name of the organization you represent and the best telephone number to reach you if a RTFH representative needs to speak with you for further clarification.

Questions will be accepted until May 31, 2018. RTFH will post written responses to all received questions on the RTFH website no later than five business days from the date questions are due.

III. PROPOSAL CONTENT & SUBMISSION

1. Content & Format

All proposals must contain the following information:

Section 1: Cover Letter (1 page maximum)

Give a brief introduction to your organization, including years of experience in providing HMIS software solutions, scope of the software solutions provided, number of employees, and location of headquarters, time of general operations in (PST) zone, primary contact person's name, and phone number. The letter must be signed by an authorized signatory.

Section 2: Organization and Experience (2 pages maximum)

Please describe the organization's experience in providing HMIS software. Include descriptions of key staff that will work on this project. Include a list of three references who have used or are currently using your HMIS service. One reference must have experience with migrating to your HMIS from a multi-CoC large legacy system.

Section 3: Scope of Services (20 pages maximum)

Please describe proposed services as they pertain to the Scope of Services section in this RFP. For all required services, please provide a description of how your software provides a solution to this need, or could be able to provide a solution pending additional development, include itemized, estimated cost for additional development in Section 3. Provide screenshots as appropriate. For any services requested as "Desired" or "Highly Desired" please detail if this function is currently available or in development.

For applicable desired and/or highly desired services, describe how your software provides a solution to this need, or could be able to provide a solution pending additional development.

Section 4: Planning and Cost (10 pages maximum)

Provide a project plan that details all activities, resources, estimated times, and all one-time & ongoing costs necessary to successfully implement the project.

Attachment 1: Proposer Information (1 page)

Please fill out Attachment 1, which details Proposer Information, Legal Authorized Representative & Fiscal Accountability Agent and the contact person for the RFP.

Attachment 2: Required Core Documents

Proposers must submit the most recent versions of Core Documents (See Attachment 2) along with the proposal prior to the proposal submission deadline. Proposers must also submit the Certification of Core Documents and the Certification of Litigation and Contract Compliance, which are available online at <http://www.rtfhsd.org/category/news-events/>.

2. Submission

Proposers must submit one (1) original and 1 complete copy of the complete proposal. The original must be marked "Original" on the upper right side of the cover and must bear the actual "wet" signatures of the person(s) authorized to sign the proposal. The copy must be numbered on the upper right hand side of the cover to indicate "Copy No. 1".

Proposers must also submit one complete copy in electronic format such as CD, memory stick or external hard drive. The electronic and hard copy shall be identical to the original document in order to be reviewed, including having each "tabbed" document individually saved.

Prior to submission, please review all copies of your proposal for consistency and proper order.

Formatting and Content Requirements

1. Proposal responses must comply with the requirements detailed in this document. Proposals that are incomplete, have inadequate number of copies, lack required attachments, or have other content errors or deficiencies, including incomplete cost information, will be rejected. Contextual changes and/or additions to the proposal after the deadline will not be accepted.
2. The proposal must be submitted in the legal name of the corporation. Proposals must be signed by authorized representative(s) of the Proposer organization who have legal authority to enter into a binding contract agreement with RTFH.
3. Proposals must be submitted in a securely fastened format. Each page of the proposal, including exhibits, must be numbered sequentially at the bottom of the page to indicate "Page _ of _". The proposals must contain tabs marking each required attachment or section of the application. The original should be submitted in a tabbed binder, preferably in the smallest size binder that will hold the proposal. The copy should be fastened with a binder clip and should include tabbed dividers. Proposals that are not fastened are not sequentially numbered pages or are not tabbed, may not be accepted.

Application questions, response format restrictions, supporting document templates and additional guidance can be found in the technical assistance information online at <http://www.rtfhsd.org/category/news-events/>.

Proposal Submission

Proposals submitted in response to this RFP will be due in accordance with the following dates:

All proposal packets must be received by mail or messenger/delivery in the RTFH office no later than 2:00 PM (Pacific Daylight Time), June 8, 2018. Applications will not be accepted via facsimile. Proposals received after 2:00 PM (Pacific Daylight Time), June 8, 2018, will not be accepted.

Submit proposal packets to:

Attn: 2018 HMIS RFP – Proposal Submission
Regional Task Force on the Homeless
4699 Murphy Canyon Road, Suite 104
San Diego, CA 92123
admin@rtfhdsd.org

Amendments and/or addendums submitted to RTFH after the proposal deadline will be not be reviewed. However, RTFH reserves the right to request clarification of unclear or ambiguous statements made in the proposal.

IV. PROPOSAL EVALUATION AND SELECTION

1. Overview

The Proposal Evaluation Process will take place in two (2) phases:

Phase 1: All proposals received by the submission deadline will be submitted for a Threshold Review by RTFH staff. Proposals that meet all Threshold Requirements, as outlined in the RFP, will be recommended to move on to Quality Review and will be submitted for the approval of the RTFH HMIS Exploratory Change Committee and posted to the RTFH website. <http://www.rtfhdsd.org/category/news-events/>. Proposals that do not meet threshold requirements may not move to the Quality Review phase.

Phase 2: Proposals recommended for Quality Review will be evaluated through the demonstration of their software live with a panel of front-end users and system administrators followed by the Hands-on experience, by a panel of experts, which will be referred to as the "Evaluation Panel" and scored independently based on the criteria outlined in the Phase 2: Quality Review section of this RFP.

2. Phase 1: Threshold Review

Proposals will be reviewed for completeness. Proposals that do not include all of the requested documents, demonstrate Proposer’s eligibility, project appropriateness and demonstrated ability to perform the services to scale, as detailed in the RFP may be rejected at the RTFH staff sole discretion.

3. Phase 2: Quality Review

Once a proposal passes Threshold Review, it will move on to Quality Review. Each proposal’s content, responsiveness, conciseness, clarity, relevance, and adherence to the instructions in this RFP will be considered when scoring each category. Proposals will be evaluated based on the following criteria:

Scoring Area	Points
User Experience Software demonstration (10), Hands-On expert panel (15)	10+15=25
System Features, Function and Administration	15
System Performance and Reporting – required (10) Desired (15)	10+15=25
Support & Customer Service & Training	20
Cost Effectiveness/Budget	15
Total Points Possible	100

User Experience

Software Demonstration: Proposers will be invited to demonstrate their software live with a panel of front-end users and system administrators.

Hands-On Experience: The Proposer will set-up a sandbox environment for the user panel and system administrators to experience the software first hand.

User experience will be evaluated according to the following criteria:

- Intuitive Design – How easy is it to understand the layout of the software?
- Learning – How quickly can an inexperienced user orient themselves?
- Efficiency – How quickly can an experienced user accomplish tasks?
- Subjective – Overall assessment of the software’s suitability to a front-end user’s work.

System Features, Function and Administration

The panel will evaluate the Proposer's ability to set different access levels on universal data elements, program specific data elements, and case notes. The panel will evaluate the system ability to support mobile experiences, program eligibility functions, master list functions and submitted timetables and plans for data migration will be assessed on their reasonableness and whether they meet RTFH's requirements. The Proposers will be evaluated on the software's ability to export and import data in HUD standard format and integrate data from external CSV/XML and API sources. The ease of use and creation of Ad Hoc reporting tools, setup development environment and the general flexibility and compliance of the system.

System Performance and Reporting

The Proposers will be evaluated based upon the scope and functionality of all HUD standard system reports. The Proposers will also be evaluated based upon the ease of use for ad hoc reporting solutions, compatibility for 3rd party reporting tools (data visualization software, mapping software, etc.), and overall accessibility of data to meet various CoC needs (local backups, direct access, etc.). Live or near real time reporting capabilities will be evaluated.

Support, Customer Service and Training

The Proposers will be evaluated on their ability to demonstrate timely, effective, and convenient support to the RTFH HMIS team. This will include help desk availability during operating hours, technical support for system administrators, ability to provide tech support for initial implementation, provisions for ongoing system maintenance, updated software material ability to make ongoing enhancements to comply with standards, as well as, satisfactory response times for fix and patch releases. Training materials provided to support proposed system change will be part of the evaluation.

Cost Effectiveness/Budget

The panel will evaluate the feasibility, cost-effectiveness, reasonableness, and accuracy of the budget. Proposals will be evaluated on their cost relative to current costs and to other proposals.

4. RFP Addenda/Clarifications

If it becomes necessary to revise any part of this RFP or provide additional information after the RFP is released a written addendum will be posted on the RTFH website at <http://www.rtfhsd.org/category/news-events/>. It is the responsibility of the Proposer to review any publicly available addendum or information on the RTFH website prior to submission of the proposal. If a Proposer does not have access to the RTFH website, they may call (858) 292-7627 and request a printed copy of any addenda via fax or mail. RTFH is not responsible for information requested within three (3) days of the due date of the proposal under this RFP.

V. PROPOSAL CONDITIONS AND RESERVATIONS

- A. All costs of proposal preparation shall be borne by the Proposer organization. The RTFH shall not, in any event, be liable for any pre-contractual expenses incurred by the Proposer in the preparation and/or submission of the proposal. The Proposer shall not include any such expenses as part of the budget in the proposal.
- B. Submission of a proposal shall constitute acknowledgement and acceptance of all terms and conditions contained in the RFP.
- C. Submission of a proposal shall constitute a firm and fixed offer to the RTFH that will remain open and valid for a minimum of 120 days from the application submission deadline. The proposal should always include the Proposer's best terms and conditions.
- D. The proposal must set forth full, accurate, and complete information as required by this RFP. No changes or additions are allowed after the proposal deadline.
- E. The RTFH cannot certify, license or endorse grant writers. Proposers are free to select any grant writer. The responsibility for the performance of the grant writer rests with the Proposer.
- F. Responses to this RFP become the exclusive property of the RTFH. All proposals will be considered public documents, subject to review and inspection by the public at RTFH's discretion. Exceptions will be those pages in each proposal which are defined by the Proposer as business or trade secrets and are marked as "TRADE SECRET" or "CONFIDENTIAL". The RTFH shall not in any way be liable or responsible for the disclosure of any such records, including, but not limited to, those so marked if the disclosure is deemed to be required by law or by court order. Selection or rejection of a proposal does not affect these rights.
- G. The RTFH reserves the right to communicate in writing with funders or organizations associated with the Proposer to obtain additional clarification of design of program, or Proposer fiscal and programmatic capacities, and to utilize this information in the evaluation process.
- H. The RTFH reserves the right to extend the RFP submission deadline should such action be in the best interest of RTFH. Proposers may revise and re-submit their proposal in the event the deadline is extended.
- I. The RTFH reserves the sole right to reject any or all proposals received in response to this RFP if it is deemed inappropriate or incomplete, it fails to comply with any instruction contained in this RFP, or is not in the best interest of the San Diego City and County CoC and Imperial County CoC.
- J. The RTFH reserves the right to withdraw this RFP at any time without prior notice. Further, RTFH makes no representation that any contract will be awarded to any Proposer responding to this RFP. The RTFH reserves the right to reject any or all submissions.

- K. The RTFH reserves the right to negotiate services and costs with Proposers, including revision of program design as necessary to better meet RTFH, the San Diego City and County CoC, Imperial County CoC or HUD requirements.
- L. A Proposer shall not be recommended for funding, regardless of the merits of the proposal submitted, if it has a history of contract non-compliance with RTFH or any other funding source, a contract suspension, a termination for cause by RTFH or any other funding source, or outstanding financial obligations with RTFH that have not been adequately resolved with RTFH or any other funding source. In the event that the Proposer has any contract(s) with RTFH suspended or terminated, it shall not be eligible for funding under any RFP released by RTFH for a period of five (5) years starting from the effective date of suspension or termination.
- M. Willful misstatements of information will result in non-recommendation for funding, regardless of the merits of the proposal submitted.
- N. The RTFH reserves the right to verify information submitted in the proposal. The RTFH reserves the right to request additional data to verify information submitted with the proposal, at its sole discretion. If the information in the proposal cannot be verified and if RTFH determines the errors are not willful, RTFH reserves the right to adjust the rating points awarded.
- O. If an insufficient number of qualified proposals are received or if the proposals received are deemed non-responsive or not qualified as determined by RTFH, RTFH reserves the right to re-issue an RFP, execute a sole-source contract with a vendor, or otherwise ensure that services are provided by other means in a manner consistent with the program requirements.
- P. The Proposer must be in compliance with applicable civil rights laws and Executive Orders. There must be no outstanding findings of noncompliance with civil rights statutes, Executive Orders, or regulations, unresolved secretarial charge of discrimination issued under the Fair Housing Act, no adjudications of civil rights violations on a civil action or deferral of processing of proposals from the vendor imposed by HUD.
- Q. The Proposer shall be ineligible to receive funding under this RFP if any officer or employee of the Proposer who would be involved in the administration of grant funds has been convicted of a criminal offense related to the administration of funds or any member of its executive management, key staff, or any officers of its Board of Directors is involved in any litigation or other legal matter that compromises the organization's ability to carry out the project as awarded.
- R. The RTFH reserves the right to fund all or a portion of a proposal and/or require that a Proposer collaborate with another in the provision of a specific service if it is in the best interest of RTFH, the San Diego City and County CoC, Imperial County CoC or HUD.
- S. The RTFH reserves the right to waive minor technical deficiencies or any informality in a submitted proposal.

- T. Proposals may be withdrawn by written request of the authorized signatory on organization letterhead at any time prior to the RTFH's actions on staff's final recommendation for funding.
- U. If a Proposer declines to implement the project or changes significant project specifications which are deemed relevant to the basis on which the award was granted, thereby negating the opportunity to be awarded funding approved under a RTFH competitive process, said organization shall not be eligible to submit an application for any other new project funding for a period of one year from the time of notice.
- V. Only designated employees of RTFH are authorized to communicate with Proposers concerning this Request for Proposal. It is improper for any officer, employee or agent of RTFH, or of any private or public funder or HMIS Provider Agency, to solicit consideration, in any form, from a Proposer with the implication, suggestion or statement that the Proposer's provision of the consideration may secure more favorable treatment for the Proposer in the award of the contract or that the Proposer's failure to provide such consideration may negatively affect RTFH's consideration of the Proposer's submission. A Proposer shall not offer or give, either directly or through an intermediary, consideration, in any form, to an officer, employee, agent or funder or HMIS User Agency of RTFH for the purpose of securing favorable treatment with respect to the award of the contract.

A Proposer shall immediately report any attempt by an officer, employee or agent of RTFH to solicit such improper consideration. The report shall be made to the Chairman of the Board of RTFH. Failure to report such a solicitation may result in the Proposer's submission being eliminated from the RFP consideration. Among other items, such improper consideration may take the form of cash, discounts, services, the provision of travel or entertainment, or tangible gifts.

- W. Upon the request of RTFH, a Proposer whose bid is under consideration for the award of the contract shall provide RTFH with written authorization to request a credit report from a reputable credit agency to gain satisfactory evidence of the Proposer's financial background, stability and condition.
- X. Notwithstanding a recommendation of a department, agency, individual, or other, the RTFH Board of Directors retains the right to exercise the final decision concerning the selection of a proposal and the terms of any resultant Agreement, and to determine which proposal best serves the interests of the San Diego City and County CoC and Imperial County CoC.
- Y. A bid/proposal, which contains conditions or limitations established by the Proposer, may be deemed irregular (and nonresponsive) and may be rejected by RTFH, in its sole discretion.
- Z. The RTFH reserves the option to renew contracts awarded through this RFP for up to four (4) additional years, contingent upon but not limited to the following: a) satisfactory contractor performance; b) availability of funds; and c) demonstrated community need.

VI. CONTRACT CONDITIONS

Contractors will be required to comply with conditions set forth by the RTFH, the San Diego City and County CoC, Imperial County CoC and the U. S. Department of Housing and Urban Development (HUD), hereafter referred to as "Funders". These conditions include, but are not limited to the following:

- A. The initial recommendation for funding should not be construed as a finding that the proposed program complies with all requirements and conditions for a contract for grants. RTFH reserves the right to fund all or a portion of a proposal and/or require that a Proposer collaborate with another in the provision of a specific service if it is in the best interest of RTFH. A funding recommendation or offer to contract may be withdrawn upon failure of reasonable attempts to negotiate an agreement.
- B. Successful Proposers will be required to satisfy RTFH's and other participating provider or entity's insurance requirements. Additionally, all Proposers must comply with all contractual requirements. Contractors will name RTFH and the San Diego City and County CoC and Imperial County CoC as additional insured on general liability, professional liability (where required), auto liability (owned and non-owned), workers' compensation, and errors and omissions policies (where required).
- C. Contractors shall make available to representatives of Funders, upon reasonable notice, the fiscal records and/or client data records pertaining to the contract.
- D. Contractors shall comply with reasonable requests from Funders concerning promotional activities related to the SaaS.
- E. Contractors acknowledge that, as recipients of Federal funds, they will be required to comply with Federal regulations pertaining to the use of such funds. It will be the Contractor's responsibility to ensure compliance with applicable regulations.
- F. The Contract shall include standard clauses and in some cases, certifications, requiring Contractor's compliance with, but not limited to, the following regulations: non-discrimination, affirmative action, and equal opportunity; separation of church and state; Americans with Disabilities Act (ADA); conflict of interest; restrictions on lobbying; debarment; audits; rights in data; drug-free workplace; lead-based paint and Equal Benefits Ordinance.
- G. Contractors shall maintain any applicable licenses or permits.
- H. Contractors shall participate in information networking, training, and coordination meetings as directed by RTFH or other grant funding sources.
- I. Contractors shall cooperate with related research and evaluation activities as directed by RTFH or other grant funding sources.

- J. Contractors will be required to submit a Code of Conduct which will address conflict of interest requirements.
- K. Contractors may not enter into an agreement with a subcontractor under any project funded under this RFP, unless that subcontractor and its qualifications are fully described in the proposal, and the intention to subcontract is explicitly stated in the proposal or the use of the subcontractor has been approved in writing by RTFH. Contractor shall remain liable for the performance of the subcontractor, and will require subcontractor to adhere to all provisions in the contract between RTFH and contractor.
- L. When applicable, Contractors will ensure that an annual financial audit is performed in compliance with Title 2 of the Code of Federal Regulations Part 200 (2 C.F.R.200) Subpart Audit Requirements, if it spends, in aggregate, \$750,000 or more of Federal funds per fiscal year, Contractor shall submit a copy of the audit report to RTFH within nine months after the end of the contractor's fiscal year.
- M. Each contractor must comply fully with all of the requirements specified in this RFP and committed to in the program proposal, otherwise contractor risks immediate termination of contract.
- N. The responsibility for accuracy rests entirely with the Proposer. If a Proposer knowingly and willfully submits false performance or other data, RTFH reserves the right to reject that proposal. If it is determined that a contract was awarded as a result of false performance, financial or other data submitted in response to this RFP, RTFH reserves the right to terminate said contract immediately.
- O. The RTFH reserves the right to extend the duration of the contract as well as to renegotiate the terms of the contract if an extension is granted.
- P. Awards are made subject to receipt of award of funds from Funders by RTFH. Contractor agrees that if Funders do not provide funds for program, contract will be deemed null and void. RTFH reserves the right to adjust funding levels based on the availability of funds and the quality of proposals received.
- Q. The Grant Agreement between RTFH and its funders may be incorporated by reference into all contracts between RTFH and the vendor.
- R. Contract agrees that any and all data contained in the HMIS, and training materials developed under the awarded contract shall be owned by and for the exclusive benefit of RTFH. RTFH shall be deemed the sole and exclusive owner of all rights, title, and interests therein, including all copyright and proprietary rights relating thereto. Under no circumstances shall data contained in HMIS be used by Contractor without RTFH's written authorization. In the event that RTFH authorizes the use of training materials by Contractor, all such materials shall disclose RTFH's ownership of said material.

- S. The RTFH reserves the right to terminate contracts awarded under this RFP if the Contractor is unable to commence services within three (3) months of the effective date of the contract. If a contract is terminated under these conditions, RTFH may award the de-obligated funding to remaining vendors who submitted proposals under the RFP and received fundable scores.

ATTACHMENT 1

A. Proposer Information

LEGAL NAME OF LEAD PROPOSER:

EXECUTIVE DIRECTOR:

EXECUTIVE DIRECTOR E-MAIL:

EXECUTIVE BOARD CHAIR:

AGENCY ADDRESS:

CITY:

ZIP:

AGENCY TELEPHONE:

B. Legal Authorized Representative & Fiscal Accountability Agent

(The person(s) authorized to enter & sign contracts, payment requests, checks, and legal documents)

AUTHORIZED REP. / TITLE:

AUTHORIZED REP. TELEPHONE:

AUTHORIZED REP. E-MAIL:

AUTHORIZED FISCAL REP TITLE

AUTHORIZED FISCAL REP PHONE

AUTHORIZED FISCAL REP E-MAIL

C. Contact Person for RFP

(If different from Authorized Rep.)

CONTACT PERSON*/TITLE

CONTACT PERSON TELEPHONE:

CONTACT PERSON E-MAIL:

ATTACHMENT 2

If you have intentionally left an attachment out of the proposal, please submit a document using the following nomenclature: "Document Name - Intentionally Left Blank". Include the explanation of why the attachment is not relevant to your proposal in this document

Required Core Documents
<input type="checkbox"/> <input type="checkbox"/> Articles of Incorporation, including any amendments, and by-laws
<input type="checkbox"/> <input type="checkbox"/> Audited financial statements, including if required, OMB A-133 Single Audit (last 2 fiscal years or written explanation as to why no audit was conducted)
<input type="checkbox"/> <input type="checkbox"/> Conflict of Interest Policy
<input type="checkbox"/> <input type="checkbox"/> SSL Certification
<input type="checkbox"/> <input type="checkbox"/> Service Organization Controls (SOC) Report (SSAE 16)
<input type="checkbox"/> <input type="checkbox"/> Executive Leadership/Senior Management Team (Resumes or Short Biographies)
<input type="checkbox"/> <input type="checkbox"/> Insurance - Evidence of General Liability and Workers Compensation Insurance (Organization-wide and project specific as applicable)
<input type="checkbox"/> <input type="checkbox"/> Litigation and/or Contract Compliance Certification (form can be found on the RTFH website at: http://www.rtfhsd.org/category/news-events/)
<input type="checkbox"/> <input type="checkbox"/> Core Document Certification (form can be found on the RTFH website at: http://www.rtfhsd.org/category/news-events/)