



AUTOCENE

Autocene Government Solutions, Inc.

Kirk Deininger | Chief Revenue Officer

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Sioux Falls, SD 57105

kirk@acgovsolutions.com

County of Humboldt

Homeless Management Information
System

RFP No. DHHS2023-03

Proposal Submission Deadline:
October 20, 2023 by 4:00 p.m.

1.0

Introductory Letter

Thank you in advance for taking the time to consider our proposal.

Autocene offers a no-code, Intelligent Automation platform to create high-impact applications for any scale.

The Autocene platform is used by some of the largest corporations in the world, as well as many state and local governments that include:

- The Massachusetts Division of Capital Asset Management & Maintenance
- The Massachusetts Supplier Diversity Office
- The Massachusetts Dept. of Housing & Community Development
- Washington State Dept. of Children, Youth and Families
- The Superior Court of California
- San Jose, CA – South Bay Water Recycling
- The Connecticut Health & Education Facilities Authority
- The Connecticut Dept. of Admin. Services
- New York City Dept. of Social Services

In this proposal, our team will demonstrate Autocene’s ability to provide the County of Humboldt with a Homeless Management Information System that exceeds the requirements of this RFP.

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Although not using Autocene specifically as a HMIS, those customers listed above use our platform to solve challenges with all of the same components/functionality as is required by Humboldt County in this RFP. Those components include:

- Case Management
- Data Collection, Searching & Sorting
- Detailed Reporting
- Alerts, Notifications & Reminders
- Data Security
- Role Based Authorization & Access

Autocene's proposal offers the County of Humboldt a cost-effective online platform to simplify business other processes as well. Our proposal includes our Enterprise Premier Support package to ensure superior customer service, along with up to 20 hours of professional services each month that can be used for changes/edits to the system.

We look forward to providing additional information and a demonstration of the Autocene Homeless Management Information System solution. We are confident that you will find no other provider who has taken this innovative and comprehensive approach.

I certify that I have the authority to bind Autocene Government Solutions, Inc. under this proposal/offer.

Sincerely,

DocuSigned by:

 10/20/2023
 38A1945D4BC64AC...

Autocene Government Solutions, Inc. | Kirk Deininger | Chief Revenue Officer
 o: 925.264.0045 x200 m: 925.899.6344
kirk@acgovsolutions.com



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3.0 Signature Affidavit

**REQUEST FOR PROPOSALS NO. DHHS2023-03
HOMELESS MANAGEMENT INFORMATION SYSTEM
ATTACHMENT A – SIGNATURE AFFIDAVIT
(Submit with Proposal)**

REQUEST FOR PROPOSALS – NO. DHHS2023-03 SIGNATURE AFFIDAVIT	
NAME OF ORGANIZATION/AGENCY:	Autocene Government Solutions, Inc.
STREET ADDRESS:	519 W. 22nd Street, Suite 100
CITY, STATE, ZIP	Sioux Falls, SD 57105
CONTACT PERSON:	Kirk Deininger
PHONE #:	925.899.6344 mobile
FAX #:	
EMAIL:	kirk@acgovsolutions.com

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Government Code Sections 6250, et seq., the “Public Records Act,” define a public record as any writing containing information relating to the conduct of public business. The Public Records Act provides that public records shall be disclosed upon written request, and that any citizen has a right to inspect any public record, unless the document is exempted from disclosure.

In signing this Proposal, I certify that this firm has not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or agency to submit or not to submit a Proposal; that this Proposal has been independently arrived at without collusion with any other Proposer, competitor or potential competitor; that this Proposal has not been knowingly disclosed prior to the opening of Proposals to any other Proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned is an authorized representative of the above-named agency and hereby agrees to all the terms, conditions and specifications required by the County in Request for Proposals No. DHHS2023-03 and declares that the attached Proposal and pricing are in conformity therewith:

	Chief Revenue Officer	
Signature	Title	Date
Kirk Deininger	10/20/2023	

Name Date

This agency hereby acknowledges receipt / review of the following Addendum(s), if any


Addendum # Addendum # Addendum # Addendum #



4.0 Professional Profile

A. Organization Overview

1.

Company Name	Autocene Government Solutions, Inc.
Organization Address	519 West 22nd Street, Suite 206 Sioux Falls, SD 57105
Primary Contact	Kirk Deininger Chief Revenue Officer o: 925.264.0045 x200 m: 925.899.6344 kdeininger@autocene.com
Mission statement	Autocene seeks to help government agencies become more efficient by streamlining business processes, and updating their legacy systems.
Accreditations, Certifications, and Licenses	<p>Autocene is very serious about the security of our customers' data. Autocene security certifications include:</p> <ul style="list-style-type: none"> • SOC 2 Type II • HIPAA • ISO 27017:2015 • ISO 27018:2019 • ISO/IEC 27001:2013 
Legal Organizational Status	Corporation
Current Staffing Level	29

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2.

Primary Scope of Service	Autocene provides government agencies with enterprise grade solutions for streamlining their mission critical applications & processes.
Providing this Service for	Twelve (12) years
Prior operating name	Sigma Management Technologies
The total number of government agencies for which the Proposer has provided Homeless	<p>The Autocene platform is used by many state and local governments that include:</p> <ul style="list-style-type: none"> • The Massachusetts Division of Capital Asset Management & Maintenance

Management Information Systems with capabilities equivalent to those set forth in this RFP.

- The Massachusetts Supplier Diversity Office
- The Massachusetts Exec. Off. of Housing & Livable Communities
- Washington State Dept. of Children, Youth and Families
- The Superior Court of California
- The Connecticut Health & Education Facilities Authority
- The Delaware River Joint Toll Bridge Commission
- New York City Dept. of Social Services
- The City of San Jose, CA

Established in **2010**, Autocene is a **private North American software company** based in **Sioux Falls, SD** with offices in **San Ramon, CA** and **Calgary, AB**.

Autocene has been developing business automation technology and providing services since its inception. Autocene combines the ease of no-code application development with the power of Intelligent Automation, providing users with a configurable platform to create impactful applications that can efficiently solve problems of any scale.

Autocene has developed an enterprise-level system that empowers users to interact with highly functional and user-friendly applications through a web-based interface. These applications can be customized to allow external parties, such as residents, to engage with processes and applications in a sophisticated manner. Autocene's applications also provide the ability for staff and process participants to receive notices and reminders.

Regardless of the interface used, all data, metadata, and attachments are securely stored within the Autocene database (MICROSOFT SQL SERVER) which then may be made available for custom reporting to authorized users. Once the data is stored in the SQL Server database, through the use of Autocene Passport, that data can be further integrated into a wide variety of other enterprise applications and databases. Autocene Passport is the tool that we'll be using to migrate data from your existing data management system and integrate information with your other applications.

You will see examples of our experience and qualifications in this response that describes the product and Homeless Management Information System modules.

3. There has been no litigation against the company.
4. The company has not been convicted of any fraud.
5. Autocene has never been barred or excluded from participating in any state or federal government programs.
6. Autocene has never violated any local, state, and/or federal regulatory requirements.
7. Autocene Government Solutions, Inc. is an independent organization with no financial or legal issues, and no ongoing SEC investigations.

B. Overview of Qualifications and Experience

1. Proposer Experience with Homeless Information Systems Although Autocene has not currently provided homeless information systems, we are providing all of the functionality required in this RFP to our other government customers.

Our team has led capital program business transformations which include standards, procedures, tools, OCM, and training for technology implementation projects at several large agencies. In our experience, we have found that the most successful strategy is to have continuous engagement with the Departments to gather feedback as the solution is being configured. As Departments will have potential competing timelines and agendas, a collaborative project management approach will be crucial to completing the project within scope, on time, on budget, and with a high level of adoption post-implementation.

We have compiled a list of Autocene's recent projects to demonstrate our qualification as the County's top choice for this project. For your reference, we have included below a summary for each agency.

- A. The Massachusetts Division of Capital Asset Management & Maintenance Designer Selection Portal
- B. The Massachusetts Executive Office of Housing and Livable Communities – Designer Selection Committee Portal
- C. Superior Court of California – Digital Jury Project
- D. City of San José, Office of Equality Assurance
- E. Washington State Department of Social & Health Services & Department of Children Youth and Families - Telework Solution

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A.) The Massachusetts Division of Capital Asset Management & Maintenance Designer Selection Portal

The Commonwealth of Massachusetts DCAMM is responsible for capital planning, public building construction, facilities management, and real estate services. DCAMM and subagency The Designer Selection Board works with other state agencies to create and manage forward-thinking, sustainable buildings to meet the needs of the citizens they serve and helping fellow agencies meet their strategic needs with fiscally responsible building and real estate solutions.

Autocene helped DCAMM/DSB create & implement a statewide database to provide a searchable directory of minority, woman, and veteran owned architecture firms. "Autocene makes applying for state projects and partnering with more diverse firms a cohesive process". Firms are able to search the Autocene Database for projects, select sub-consultants and put teams together, respond to evaluations, and apply to projects. The resultant statewide database of designers and sub-consultants is used by public agencies and municipalities to enter their evaluations, for any public project in Massachusetts.

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The screenshot shows the 'AUTOCENE USER ENROLLMENT' form. It includes fields for 'FULL LEGAL FIRM NAME', 'FIRST NAME', 'LAST NAME', 'EMAIL ADDRESS', 'USER LOGIN', and 'USER PASSWORD'. There are also sections for 'CONFIRM PASSWORD' and a checkbox for 'Please confirm all the information is correct'.

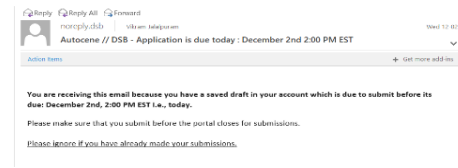
Autocene gives DCAMM/DSB various ways of collecting information and a simple interface for enrolling users into the Statewide Registry.

The screenshot shows the 'Designer Selection Board Database Search Engine' interface. It features a search bar, filters, and a table of search results with columns for various attributes.

Autocene gives DCAMM the ability to sort on criteria collected during the registration process, the ability to "drill down" into that information, and the ability to create reports on any data or metadata collected.

This is another view of the 'Designer Selection Board Database Search Engine' interface, showing a different set of search results or filters.

Autocene provides the ability to upload documents as part of the process, search and then download those documents.



Autocene provides different automatically generated notices and letters. Similar functionality could be used to notify OTPs of duplicate patient requests and other activities.

The screenshot shows the 'Designer Selection Board Annual Reporting' interface. It displays a table with columns for 'FIRM', 'STATUS', and 'DATE', containing various data points related to the reporting period.

Autocene also provides DCAMM/DSB with configurable and detailed reporting for audit and compliance purposes.

**To access full details of this project, you can simply click on this link [Case Study Massachusetts Designer Selection](#)*



B.) The Massachusetts Department of Housing and Community Development – Designer Selection Committee Portal

The Department of Housing and Community Development, through its community and business partners, provides affordable housing options, financial assistance, and other support to Massachusetts communities. We oversee different types of assistance and funding for consumers, businesses, and non-profit partners.

After seeing the success that DCAMM/DSB had with creating a statewide centralized database/registry of MWBE firms, DHCD made the decision to also move forward with creating its own portal for all contractors performing design, architectural or construction services.

Designer Selection Committee
<https://www.mass.gov/orgs/housing-and-community-development> 100 Cambridge St, Suite 300, Boston, MA 02114 Telephone: (617) 573-1100

Evaluation Report

PREVIEW OF SELECTED CONSTRUCTION EVALUATION

Firm Name AEOLIS ARCHITECTURE AND DESIGN		Project Name Test Non-DSB Project Name Input	
Project Number Test-Project-001	DSB List Number	Facility Type State	Evaluator Hazel Lobos
Project Location Boston, MA	Project Completion Date 2018-07-19	User Agency Name Test User Agency	
Project Type			
<input type="checkbox"/> Master Plan	<input type="checkbox"/> Feasibility Study	<input type="checkbox"/> Facility Conditions Assessment	<input type="checkbox"/> New Construction
<input type="checkbox"/> Alteration/Renovation	<input type="checkbox"/> Repair/Maintenance	<input type="checkbox"/> Restoration/Preservation	<input type="checkbox"/> Addition
Management Score Total 4		Management Comments Management Comment for question 1.	
Quality Score Total 4		Quality Comments Quality Comment for question 2.	
Schedule Score Total 4		Schedule Comments Schedule Comment for question 3.	
Budget Score Total 4		Budget Comments Budget Comment for question 4.	
Overall Score 4		Overall Comments Firm's performance was excellent per different agencies. When over budget, they took the lead in suggesting strategies for reducing cost – finding creative ways to bring the costs back in line – from incorporating a hybrid of materials to reconfiguring the layout. The entire team was great to work with – they were professional and responsive. I highly recommend them for any future projects.	

Include this Evaluation
Don't Include Evaluation

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Designer Selection Committee
<https://www.mass.gov/orgs/housing-and-community-development> 100 Cambridge St, Suite 300, Boston, MA 02114 Telephone: (617) 573-1100

Public Notice Project Summary

NAVIGATION BAR

Instructions	Public Notice Search	Project Summary	Registration & Disclosure Setup	Sub Consultant(s)	Application	Evaluations	References	Submission
1	1	2	3	4	5	6	7	8

Please [Click Here](#) to Download and View the Full Project Listing

DSB PUBLIC NOTICE DATE:	2020-01-01
LAST DATE FOR FILING APPLICATION IS:	12/31/2020 02:00 PM
PROJECT NUMBER:	2019-ABC
PROJECT TITLE:	CSD Testing Facility
PROJECT LOCATION:	Andover, MA
PRIME FIRM REQUIRED:	Architect
USER AGENCY:	Department of Public Health
AWARDING AGENCY:	DHCD
PROJECT SUMMARY:	This project is listed only for testing purposes. This is the redevelopment of an existing mental health facility into a new CDD oil testing facility.

Continue

C.) Superior Court of California –Digital Jury Project

The Superior Court of California – County of San Francisco Court recently set out to develop an electronic public-facing application and database to manage and process California Rules of Court 10.500 requests and digitize/automate their Jury Selection & Onboarding processes. With 11 different divisions handling over 217,000 criminal and civil cases a year, SF Courts needed a way to quickly transition to a digital jury screening and onboarding system to maintain civic responsibility to the community while adhering to California Department of Health’s COVID-19 Social Distancing Guidelines.

SF Courts selected the Autocene Technology Platform to help them quickly configure and deploy these high impact applications to the public. Autocene worked with SF Courts Project Manager’s to identify Court workflows, project objectives, and potential configurations to meet business needs. Autocene team members Oscar Velez and Andrew Gautron quickly deployed the Autocene Platform and assisted in subsequent configurations to optimize new workflows, forms and automation structure. They also provided training and resources to project managers and relevant staff on how to use Autocene and the configured applications. They are continuing to provide post-deployment support and maintenance to SF Courts employees and the public.

Delivered Applications for Project:

Case Onboarding and Group Assignment - Onboarding, assigning juror groups to case, and attaching case timeline for jurors to review

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Juror Check in - Check in action when jurors are assigned to case.

Juror Hardship - Check in action when jurors assigned to case, after check in completed.

Questionnaire Launcher - create a new questionnaire template, edit existing questionnaire, assign questionnaire to a case. Any of these options kick off passport task.

Jury Reporting Status - Report to see each case information.

Questionnaire for Juror - If hardship is denied, juror questionnaire kicks off.

Assign a Questionnaire to Case – Autocene Passport Integration to assign a juror questionnaire to a case.

Juror Onboarding (Passport Integration) - Passport pulling juror data from JSI

Name	PIN	Perem	Hardship	Cause	NotRch	Sworn	SwmAlt	AB	Badge
Leslie Knope	1111	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	654321

D.) City of San José, Office of Equality Assurance

The Office of Equality Assurance (OEA), monitors public works projects to ensure contractor compliance with prevailing wage laws. Contractors submit documents on a regular basis via email or traditional mail. Employees then track projects using a combination of Excel spreadsheets and hard-copy files. This method of monitoring is compartmentalized and creates document silos that restrict compliance insight, coordination, and metrics. In addition, printing out and storing each document is inefficient and costly.

Autocene helped San José to define the manual processes, utilize the Autocene platform to automate 10 different compliance processes, integrate collected data with the existing Oracle CPMS system, and configure customizable dashboards & reports to fit the city’s needs. The result has been so well received, that the department is looking to expand the platform to capture additional information while automating more manual processes. The Autocene LCM Application was compared to an industry leading compliance management system and user feedback was that the Autocene platform had surpassed the industry leading compliance management system in only 16 weeks of project work.

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Form(s)

City of San José
CAPITAL OF SILICON VALLEY

New Contract Current Contracts

Search CPMS for the new Procurement/Contract Title 4000 Search

Procurement/Contract Title Information

Procurement/Contract Title Name Fire Sprinkler Services	Project Id 4000
City Project Manager Tom McDaniel	Compliance Specialist
	Contract Award Date Tuesday, April 30, 2019
Project Type	
Funding Sources	

Procurement/Contract Title Listed Contractor

Contractor Name Express Sewer & Drain, Inc.	Contact William Heinselmann
Contractor's Address 3303 Luyang Drive, Rancho Cordova, CA, 95742	Contact's Email agautron@formverse.com

Submit Project

Form(s)

City of San José
CAPITAL OF SILICON VALLEY

New Contract Current Contracts

Search CPMS for the new Procurement/Contract Title 4000 Search

This contract has been added to the FORMVERSE database, you may now interact with it from the contract management screen.

Procurement/Contract Title Information

Procurement/Contract Title Name Fire Sprinkler Services	Project Id 4000
City Project Manager Tom McDaniel	Compliance Specialist Andrew Gautron - ALT
	Contract Award Date Tuesday, April 30, 2019
Project Type Municipal Affairs	
Funding Sources	

Procurement/Contract Title Listed Contractor

Contractor Name Express Sewer & Drain, Inc.	Contact William Heinselmann
Contractor's Address 3303 Luyang Drive, Rancho Cordova, CA, 95742	Contact's Email agautron@formverse.com

Submit Project

2. Key Personnel

Key Personnel who will be involved in the implementation and support of County Autocene platform will include:

Role	Autocene Personnel	Background	Role in Project
Executive Sponsor	Kirk Deininger	MBA Lake Forest Graduate School of Business Lake Forest, IL B.Sc. Business Bradley Univ. Peoria, IL	Kirk will participate in implementation review sessions to ensure that all pertinent Autocene resources are available as needed to ensure a successful completion & launch of County Homeless Management Information System modules. County management will have cell phone access to Kirk during the implementation period.
Compliance Officer	Solomon Avisar	Bachelor of Laws Univ. of New Brunswick B.A. and B.Sc. Queen's Univ. Kingston, ON	Sol is a successful lawyer and Autocene Board Member. Sol will be ensuring that the processes used by Autocene in the collection process are in line with County and the Commonwealth's security requirements. Sol will be ensuring that our Customer Success Team configures the modules accordingly.
Systems Administrator	Arthur Gniazdowski,	M.Sc. Engineering University of Toronto Toronto, ON M.Sc. Eng. in Electronics Wroclaw Univ. of Tech., Poland	Arthur is responsible for the development of the Autocene platform. Arthur will provide a backstop function for any technical questions or challenges that the rest of the team requires assistance in addressing. Arthur's team is also responsible for the management of our Autocene Cloud environment on AWS.
Technical Lead	Andrew Gautron	B.A. Mount Royal Univ. Calgary, AB	Andrew will provide the technical project management function for County's Autocene implementation, as well as serving as the technical lead for the project. Andrew has led our Customer

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			Success Team in implementing our largest customers during his 8+ years with Autocene.
IT Business Analyst	Odeza Bactin	B.S. Chemical Eng. Univ. of Calgary	Odeza is very detailed and analytical. This will be very important for this project. She will be working with Andrew (above) and the County team to design and implement the system & survey protocols.
Project Manager	Nancy Drader	Business Administration, Assiniboine College Brandon, Canada	Nancy has over thirty years of entrepreneurial experience as well as strong organizational skills to complement the Autocene technical team. Nancy designs, develops and executes high quality deliverables in a fast-paced environment and manages her and her team's workload efficiently.

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Here is a clear representation of the organizational structure of the company.



3. Resumes of Key Personnel

KIRK DEININGER, MBA, B.SC. | CHIEF REVENUE OFFICER

With over 30 years of experience in leadership roles with fast growing technology companies, Kirk has gained experience in all aspects of business.

Much of Kirk's expertise is in the area of ensuring customer satisfaction with technology implementations. As part of those roles, Kirk has been responsible for managing customer relationships and addressing any product/service delivery challenges.

In his various roles Kirk has gained experience in reviewing, updating and drafting policies, procedures of all kinds.

Kirk's most recent roles have been as co-founder and Chief Revenue Officer of Autocene Government Solutions, Inc. Previous experience includes various management roles at organizations that include:

- E*TRADE
- Autonomy Corporation/ZANTAZ
- Alere/Tapestry Medical
- Thomson Corp./Gale Group

EDUCATION

MBA, Lake Forest Graduate School of Business, Lake Forest, IL

B.Sc. Business, Bradley Univ. Peoria, IL

CONTACT

Email: kdeininger@autocene.com

Website: www.autocene.com

LinkedIn:

<https://www.linkedin.com/in/kirkdeininger/>

Telephone: 925-899-6344

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SOL AVISAR, M.SC. LL.B | GENERAL COUNSEL/DIRECTOR

Sol was called to the bar of Ontario in 1991. Since then, he has served as legal counsel to various businesses and governments in and out of Canada. Notably, he was involved in the development and implementation of a program that rewards excellence in technology innovation within the Canadian government. His career has been focused on driving innovation and in building the internal processes and supporting documentation that are foundation of organizational success.

He has penchant for entrepreneurship and has been involved in founding and organization of a number of technology companies.

CURRENT ROLES**SWOT LAW - Principal**

Providing curated in-house counsel services to growth-oriented technology companies with a focus on corporate organization, governance and commercial transactions.

AUTOCENE INC. – General Counsel/Director

Working integrally with management in the deployment of its proprietary software platform directed at process automation within private and public sector organizations. Currently, serving governments at all levels in the United States.

DETA INC. – Director/CEO/General Counsel

Setting up and leading a fashion tech start up which will deliver a proprietary solution for substantially improving fit

and reducing returns related to online shopping.

Documentary in the works with prominent celebrities to raise awareness of the issue and our solution.

SKILLS

- Drafting to favour of execution over complexity
- Internal policy development and implementation
- Communicating technology and innovation Team building and management Strategic planning for technology businesses
- Coaching and advising C-level executives and boards
- Stakeholder negotiations

EDUCATION

Law Society of Ontario - 1991

University of New Brunswick- 1989, LL.B

McGill University - 1987, M.Sc (Neurology and Neurosurgery)

Queens University-1984, B.Sc (Life Sciences)

Queens University -1983, B.A

Marianopolis College-1981 DEC (Health Sciences)

CONTACT

Email: sol@swotlaw.com

Website: www.swotlaw.com

LinkedIn:

<https://www.linkedin.com/in/sol-avisar-a58aa04/>

Telephone:613-762-5848

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ARTHUR GNIAZDOWSKI | CTO & SVP

Mr. Gniazdowski's technical and software development expertise helps the company create world-class products. He has over 30 years of experience in Hardware/Software Systems Engineering and Integration, Enterprise Organization Engineering and Management, Information Technology Management, and Business Analysis. His expertise spans across various industries including military programs, High-Tech, Government, Industrial, and NGO's. Arthur has successfully led and coached the development teams of various organizations, including the Canadian Dept. of National Defense, where he held a Top Secret Security Clearance. He has a proven track record of delivering exceptional products and solutions.

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Broad, hands-on experience and expertise in Enterprise Organization Engineering and Management.

Expertise includes:

- Information Technology Management
- Strategy Development,
- Strategic IT Project Management,
- IT Organizational Change,
- Web and Internet Development
- Application Portfolio Management
- IT Merging and Processes Integration,
- Business Analysis,
- Software Applications,
- Research and Development.
- Knowledge and Context Management
- IT Assets Rationalization

EDUCATION

- M.Sc. Eng. Formal Degree Evaluation, University of Toronto
- PhD Candidate, Wroclaw University of Technology, Poland
- M.Sc. Eng. in Electronics- Cybernetics and Computer Science (Honors), Wroclaw University of Technology, Poland

ANDREW GAUTRON | TECHNICAL LEAD

Andrew specializes in the enterprise technology space and has experience with both public agencies and private sector clients. Andrew's solution first approach allows him to creatively and efficiently impact business goals and outcomes.

Andrew has experience in multiple enterprise automation business avenues that include: Enterprise Purchasing & Procurement, Capex Automation, Vendor Management, Contract and Contractor Management, Document Management, and Archiving. Andrew always strives for user experience as a primary initiative in design & functionality.

RECENT PROJECTS

Massachusetts Supplier Diversity Office

Andrew led the technical team in the recent implementation for the State Agency which included registration & onboarding of vendors, a very complex set of dashboards and reporting, integration with five different State financial systems, a business opportunity exchange and a matchmaking component.

This modular system will be used by every State agency, department, county, city & town in the Commonwealth.

City of San Jose - Labor Compliance Solution

Andrew served as the technical lead on the Labor Compliance Solution for the City of San Jose. Duties included managing customer requirement, technical specifications, and client procurement. Andrew also worked on the solution level decisions and analysis of the technology environment which helped develop the technical scope before development and implementation of the solution. Andrew aligned the project with the enterprise-level system solution.

Thermo Fisher Scientific - Legal Document Creation Process

Thermo Fisher Scientific required an automated process for contract and document creation. The initial division had a group of 8,500 sales staff working with 15 legal contacts for the creation of documents and contracts, a ratio of 567:1. This created a bottleneck for contacts of 1 to 2 months. Andrew served as the technical lead who developed the technical specifications and legal document application. The automated solution creates contracts based on a questionnaire utilized by the sales department. The automated solution reduced the 1-to-2-month process to 5 minutes for document turn around. This application has been expanded to more than 60 template legal documents.

EDUCATION

Bachelors of Arts - Mount Royal University

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ODEZA BACTIN | TECHNICAL TEAM

Odeza passionately works in the software space and has had experience with a range of clients including public agencies, research centers, and Fortune 500 clients. Odeza strives for perfection in her work which allows her to diligently achieve results in all aspects of her technical assignments. Odeza has experience in multiple enterprise automation business sectors that include: Automation, Contract and Contractor Management, and Records Request Management. Odeza aims for providing applications with accurate data capture and intuitive user interfaces. She is particularly good at big picture planning and designing for scalability, along with helping customers reconcile what they want, what they need, and what the Autocene platform delivers.

RECENT PROJECTS

Texas Instruments - Compliance Tracking Applications

Odeza created the compliance tracking system for five different groups inside of TI, with each having their own criteria and requirements for compliance. Odeza's work gave those groups improved transparency and greater control of operations. This made it easier for them to make data-driven business decisions, increase efficiency and save the company money.

City of San Jose, CA - Labor Compliance Solution

Odeza worked with Autocene's Andrew Gautron to design, configure and implement the Labor Compliance application for the City of San Jose. After the initial implementation, Odeza's role in this project included gathering enhancement requests from the customer, and quickly implementing those changes.

City of Ventura, CA - 311 Solution

Odeza worked with other Autocene team members to design, configure, and implement the 311 application for the City of Ventura. Odeza's role in this project included gathering the initial requirements from the customer, describing the implementation process, designing the application and quickly creating the initial draft of the application.

EDUCATION

Bachelors of Science in Chemical Engineering - University of Calgary

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VIKRAM JALAPURAM | TECHNICAL TEAM (DEVELOPER)

Vikram specializes in the enterprise technology space and has experience with both public agencies and private sector clients. Vikram prides himself on being able to understand customer requirements and address those needs using the Autocene platform.

RECENT PROJECTS

Commonwealth of Massachusetts

Division of Capital Asset Management and Maintenance (DCAMM)

Designer Selection Board (DSB)

Vikram continues to serve as the technical lead on designer selection application used by DCAMM. Duties included managing customer requirements, technical specifications, and DSB vendor support.

Working closely together, DSB and Autocene's Customer Success Team developed a complex yet seamless set of interconnected web-based applications that provide the following functionality.

This Autocene solution allows:

- Designers to provide registration & disclosure (R&D) information
- DSB staff to create & submit a public notice of new projects available
- Automatic notifications of new projects to be sent to the designer community
- Designers to easily search a database of available projects, along with past/closed projects
- Designers to create & submit their application/response to available projects using the standard format provided by the DSB

- Designers to invite specialty "sub-consultants" to be part of their application
- Designers and agencies to submit references for registered designers
- DSB staff to rank applications based on specific criteria
- Applications for a new project generated as pdfs and made available individually or combined into a single document DSB Members to review applications on tablets or other devices
- DSB Staff to disseminate project applications without the need to scan reams of paper into pdfs
- DSB Board Members to easily vote on applications for new projects
- Documentation of every decision made for reporting & audit purposes
- Automatic generation of monthly, quarterly & annual reports on any & all data captured in the process
- Integration of data from other Commonwealth database
- Automation of the Public Records Request process

To enable this functionality, we create a centralized database of designers containing their registration information, project experience, references, and evaluations of past work. Autocene integrates this database with other Commonwealth databases.

EDUCATION

Bachelor of Science Information Technology- JNTU University, Telangana, India

- Post Graduate Diploma- International Business Management, St. Lawrence College, Toronto

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NANCY DRADER | PROJECT MANAGER

Nancy has over thirty years of entrepreneurial experience as well as strong organizational skills to complement the Autocene technical team.

Nancy designs, develops and executes high quality deliverables in a fast-paced environment and manages her and her team's workload efficiently. She is responsible for meeting tight deadlines and ensuring brand is presented properly. Nancy revamped our outdated training materials and fine-tuned our ISO 270XX submissions.

In former roles, Nancy has been involved in many large-scale data conversion and streamlining projects and is currently pursuing her PMP designation from the Project Management Institute.

EDUCATION

- Certification - Business Administration Specialized Training - Business, Assiniboine Community College, Brandon, Canada

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4. Other Relevant Experience

Autocene has cultivated a strong commitment to its customers over 13 years of operations. We have partnered with various government agencies to offer but not limited to:

- a. A virtual office with all operations online;
- b. A statewide standard platform and application process, making it much easier to do business with and attract new applications;
- c. A database of community, including evaluations, references and diversity characteristics

With Autocene Passport unique system, we can provide a high-quality Homeless Management Information System, which our partners can manage remotely, these include but not limited to:

- Automated document creation;
- Automated data Integration with other systems;
- Automated report generation and delivery;
- Automated workflow initiation;
- Capture and escalation of incoming email;
- Automated document transformations;
- Automated document storage and archiving;
- General automated monitoring and supervisory

-
*You may refer to project summary done in the past on pages 8 to 12.

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5.0 Project Description

A. Description of Services

Below is a brief overview of the Autocene Homeless Information Management Solution. The platform will be configured to County specifications. We would be happy to provide a demonstration and discuss how the system will be configured to County specific needs.

Response to 3.0 Preliminary Scope of Services

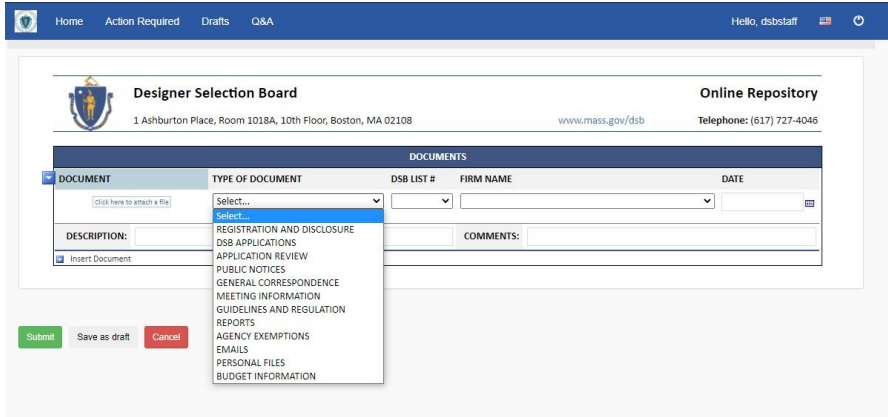
3.1 Outline of Anticipated Services:

A. Provision of a Homeless Management Information System

Requirement from RFP	Autocene Response
<p>1. An open, flexible, intuitive and efficient workflow platform and referral tracking system that minimizes the burden on front-end users and maximizes opportunities for data integration across multiple software solutions, including, without limitation, the ability to support the latest XML and CSV schema defined by the United States Department of Housing and Urban Development.</p>	<p>Autocene has a very powerful workflow engine that can automate the most complex business processes. Using our no-code platform, your business rules can be quickly recreated with Autocene.</p> <p>Our customers use Autocene to streamline everything from simple approval workflows to the very intricate ones. Some customers have used Autocene to create workflows with over 80 potential steps in the approval process.</p> <p>Data exchange for the purpose of integration with third party applications is facilitated through Autocene Integration Module called Passport. The underlying data structures and instances are defined used XML standard. There are no limitations on the format of the data exchange as the environment supports conversions between XML and JSON, CSV, ASCII etc. Various modes of operations and protocols including FTP/SFTP/FTPS are supported by the specialized Passport Adapters.</p> <p>Please see the example screenshots throughout this proposal for an idea of how other customers are using this functionality.</p>
<p>2. A user interface that is easy to navigate and provides consistent page views on a variety</p>	<p>The Autocene Platform strives to provide the County with a UI experience that conforms to a fluid and user-friendly browser-based user interface. This includes: Auto-complete, searches, drop-down data lookups, required data markups, pop-ups, and helps associated with the specific fields, etc.</p> <p>Autocene also provides our customers with full branding</p>

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<p>of devices, including, without limitation, mobile applications.</p>	<p>capabilities, which includes a color scheme, logos, and look-and-feel. Styles are based on the Bootstrap templates.</p> <p>The compatibility between Autocene Application UI representations on desktop and mobile based browsers, is provided through underlying Bootstrap fluid layout, employed to adjust GUI representation to the underlying Browser/Device.</p> <p><u>Accessibility</u></p> <p>The Autocene platform is currently at use in several Fortune 500 companies as well as several government agencies that include:</p> <ul style="list-style-type: none"> • Multiple agencies & departments in The Commonwealth of Massachusetts • Multiple departments in Washington State • The Superior Court of California • The City of San Jose • New York City <p>All of those groups had their own sets of accessibility standards that Autocene has complied with. The User Interface for Autocene can be configured to meet any of County's accessibility requirements.</p>
<p>{24}</p> <p>3. Capacity for document generation, including, without limitation, readable, printable blank forms and completed forms.</p>	<p>Yes. All data submitted in forms along with all metadata collected about the process/workflow (who, what, when, where etc.) is captured in the Autocene database.</p> <p>All/any of that information is available to be used for the creation of all types of documents, notifications and reports. Any information collected can be used to prepopulate the County's templated documents & contracts.</p> <p>Our Customer Success Team will provide a full set of documents, reports & notifications based on the County's specific requirements.</p> <p>Your team will be able to view, export and print documents that are based on business needs.</p>
<p>4. Secure upload storage for a variety of different documents, including, without limitation, consent forms, verifications, rental</p>	<p>With Autocene, every piece of data collected, every piece of metadata regarding the process, all log information, and each and every attachment is automatically captured and stored in the Autocene database. That database is updated in real-time, and it is based on a very robust Microsoft SQL Server database. Any piece of data, metadata, or attachment can be sorted, searched and/or reported on. Every change to a profile, application, consent form or agreement is tracked and available for audit.</p>

<p>agreements, and stabilization plans.</p>	<p>We can configure your applications to maintain the data for as long as required. As an example, the Commonwealth of Massachusetts Division of Capital Asset Management & Maintenance (DCAMM) is our customer. They require some data from their application to be held up to 6 years. Others have a shorter time requirement. They are uploading their older documents into the Autocene system to make them easier to search and report on.</p> 
<p>{25} 5. Built-in measures to prevent data entry mistakes and back-end reporting to identify data entry errors and guide data cleanup.</p>	<p>Our Customer Success Team has a great deal of experience working with customers to ensure the quality of data, through the design of the modules. Our team typically includes “mouse-over” help with every field as well.</p> <p>The platform itself helps to eliminate data entry errors through the use of Auto-complete, searches, drop-down data lookups, required data markups, pop-ups, check boxes and other help associated with specific fields, etc.</p> <p>For back-end reporting, all logs are available on demand. Specialized reports can be provided through the Platform Management interface.</p>
<p>6. Software with case management tools for recording various different data types, including, without limitation, case notes, follow-up instructions and queries on no</p>	<p>Yes. Autocene has a very flexible set of case management modules that can be easily configured to the County’s requirements.</p> <p>Each County staff member will have a dashboard view of the cases that they are responsible for, and have been assigned. They will also have a list of events and tasks.</p>

contact within a certain number of days.

North Carolina Department of Health and Human Services
Division of Aging and Adult Services

Home Intake Items Events Tasks Documents Cases Contacts Messages Notes

My Home June 27, 2023

Reviewing of Intake Items

Case Name	Case Type	Case Stage	Date Opened
Lucas Brown	Indigent Burials	Review	2/1/2022
Isabella Wilson	Rep Payee	Review	2/1/2022
Ethan Johnson	Guardianship	Review	12/1/2021

My Cases: 7, My Events: 6, My Tasks: 6

You have 6 unread messages.

Today's Events

Start Time	End Time	Event Name	Linked Case
9:00 AM	11:00 AM	Presentation	Rep Payee
12:00 PM	12:00 PM	Virtual Meetings	Guardianship
12:00 AM	11:59 PM	Seminar	In-Home Aide
10:00 AM	11:00 AM	Client Meeting	Adult Care Homes
11:00 AM	12:00 PM	Demo	Indigent Burials

Today's Tasks

Due Date	Priority	Task Name	Linked Case
05/10/23	High	Follow up with client	Adult Care Homes
05/10/23	High	Setup a meet	In-Home Aide
05/08/23	Medium	Send follow-up email	Special Assistance
05/08/23	Medium	Document information	Guardianship
05/04/23	Low	Prepare notes	Rep Payee

County staff can write their findings, notes, follow up instructions and requirements in unstructured text, or using a “dynamic” configurable form,

North Carolina Department of Health and Human Services
Division of Aging and Adult Services

Home Intake Items Events Tasks Documents Cases Contacts Messages Notes

Guardianship Special Assistance In-Home Aide Rep Payee Adult Care Homes (Foster Care) Adult Day Care / Adult Day Health (Adult Day Services) Indigent Burials

Client ID # Intake Date Referral Date Referred by:

Last Name First name Middle Initial

Does the client prefer to be referred to by any other name?
 Yes No

List preferred names below:

Street/Apt. Number City State ZIP County

Phone Cell Phone Emergency Contact Number Name/Relationship

Is the Emergency Contact aware of client's HIV status? Client can be contacted

they can create a Notification based on a template in the Autocene platform (designed by County), and simply add additional notes as needed. We find that providing a standardized (template based) notification often works better for our clients.

Of course, the Notification and all actions taken are recorded in the Autocene database for reporting and audit purposes.

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<p>7. Matching functionality and deduplication measures to identify and prevent duplicate client entries across agencies.</p>	<p>Autocene provides an integrated system in which all the push and pull of information is processed from the same Autocene database to address matching functionality and deduplication techniques. This reduces or entirely eliminates the need for data rekeying by both state employees and vendors. All the modules and applications work together, utilizing that database.</p> <p>Your residents can be matched by name, ID#, address or location, and any other standard data that is collected.</p>
<p>8. Functionality to support the batch import and export of data from agencies who enter program data into a separate system.</p>	<p>Our Customer Success Team is experienced in migrating data from our customers' existing legacy systems. Those systems can be a simple Access database, other database solutions, or even Excell spreadsheets or Word documents.</p> <p>Batch import and export of data is very straight forward with the help of Autocene Passport, a software solution that addresses data migration and system integration.</p> <p>Data exchange for integration with third-party applications is facilitated through Passport. The underlying data structures and instances are defined using XML standards. There are no limitations on the format of the data exchange as the environment supports conversions between XML and JSON, CSV, ASCII, etc. Various modes of operation and protocols including FTP/SFTP/FTPS are supported by the specialized Passport Adapters.</p> <p>The Autocene Platform is built around an underlying set of Web Services in technology supporting SOAP, REST, and WCF. Additionally, Autocene Passport comes with several Adapters/Connectors that enable different sets of Data/Information transfer protocols from EDI, SFTP/FTPs to XML, JSON, etc.</p> <p>Passport also enables our customers with the ability to create their own Adapters/Connectors by exposing specialized API supporting Events, Inputs, Actions and Outputs. To enhance Passport capabilities some adapters are solely dedicated to consuming specialized APIs and Web services in fully bi-directional mode if supported by API. For example: stacking Oracle and Smartsheet Adapters will enable Autocene-based applications to transfer data bidirectionally between specialized Oracle Database and/or Smartsheet and vice versa.</p>

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Please see the Autocene Passport Overview document attached to our proposal.

9. Functionality to support a coordinated entry system, including, without limitation, availability of the VI-SPDAT, with the ability for local customization of a common assessment tool, a robust referral notification system and the ability to view client's VI-SPDAT score within the client record.

Autocene will be providing your team with fully coordinated system that allows your team to perform all of their activities from within the system. That includes the VI-SPDAT intake form that has Humboldt's local differences included. We will work with your team to identify what those specific changes need to be. Our team makes the work of completing these types of assessment straightforward, by "walking" the user through each section



Each client's VI-SPDAT, and any associated information, will be viewable within the system by those with proper authorization or Role.

Each one of your Referral groups will have a profile in the system, and your referral of clients will be automatically sent (along with your case notes) to the appropriate contact at those Referral groups. All referral actions will be automatically tracked in the system and available for reporting and audit purposes.

If desired by the County, those referral organizations will have access to a dashboard and files of the clients that have been referred to them.

In addition, all of your stakeholders will have their portal access with graphical representations of the activity in their processes. Your users will be able to quickly navigate to the component most relevant to the user. That navigation will be assisted by the Role designation provided to that user. The Roles can be as broad or as specific as needed. Roles can be assigned by Department, Location, Title, or Individual. Or, the Roles provided could be a combination of all of the above.

As an example, a Role for a staff member of a Department in a

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specific Location, with a specific Title, will have a Dashboard with only the information they need, and links to the applications and data that they frequently use.

Your users can also select those components & applications on their start-screen that they want to see and/or have one-click access to.

This will all be configured during the implementation process.

10. Functionality to ensure the protection of client confidentiality in accordance with any and all applicable local, state and federal laws, regulations, policies, procedures and standards, including, without limitation: multi-factor user authentication with concurrent access prohibited; virus protection with auto-update; servers that include data and transmission encryption; public access and location controls; backup and data disaster recovery; secure disposal; automated monitoring, audit trails and access logs; access restrictions based on user role and/or

Autocene is very serious about the security of our customers' data, and goes to great lengths to ensure the confidentiality of any data collected. Autocene security certifications include:

- SOC 2 Type II
- ISO/IEC 27001:2013
- HIPAA
- ISO 27017:2015
- ISO 27018:2019



Data Security

Autocene is based on Microsoft .NET Technology with the set of the modern components including JQuery, Ajax, JavaScript, ASP and C#. The User exposed front end is developed using fluid Bootstrap components. The platform is developed with security in mind including preventive methods for cross-side scripting, validations, and verifications. Configuration of the platform enables security tokens on every single request against the exposed functions. The API's are rendered useless without these tokens. The internal environment communications between modules are done based on the HTTPS/TLS protocols, so data

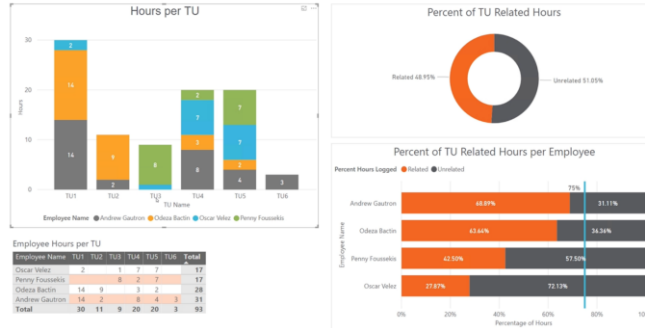
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<p>access level, including, but not limited to, reporting, data sharing and export features; and FIPS 140-2 or greater security functions as described in National Institute of Standards and Technology Special Publication 800-140Cr1.</p>	<p>in transit is encrypted.</p> <p>Application Data at rest is in binary format and is scrambled. On request data at rest can be also encrypted. It is worth to notice that encryption of the data may affect the performance of the load balancing and redundancy protocols. This is usually a subject for solution design in a relationship to the environment and performance requirements.</p> <p>The Autocene Platform can limit access to the encrypted restricted and confidential data if required, based on the Application definition, inherited or predefined User Roles and associated access rights.</p> <p>Typically, vulnerability scans are performed in a continuous monitoring mode, in practice full scans are performed on a daily basis and additionally during a preventive maintenance.</p>
<p>11. Functionality to ensure adequate reporting in accordance with any and all applicable local, state and federal laws regulations, policies, procedures and standards, including, without limitation: production of current standard United States Department of Housing and Urban Development reports, system performance measurement reports at both the program and Continuum of Care levels where</p>	<p>Yes. All data submitted in forms along with all metadata collected about the process/workflow (who, what, when, where, etc.) is captured in the Autocene database. That data can be sliced any way County requires for reporting and audit purposes. Both structured and ad-hoc reports can search across groups of projects, programs and modules.</p> <p>The Autocene platform allows County users and administrators to configure different aspects of the system without custom development. Autocene will provide a fully working system with extensive structured & ad-hoc reports. We look forward to demonstrating Autocene’s capabilities & functionality.</p> <p>Reports can take multiple formats utilizing graphical representations and colors to denote items that require actioning. In addition, data can be used with other BI systems like Microsoft</p>

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applicable and quarterly program performance reports; generation of standard project and agency level reports that track enrollments, dismissals, demographics and other program-related statistics for funders and other stakeholders; and provision of user information that track user license periods, contact information, training and login activity, inclusion in metadata for client record creation and edit and name stamps on assessment submissions or updates.

BI or Tableau. See examples in the screenshots below. The Reports can be done on demand as well as on schedule using Passport Event Scheduler and various Passport Adapters.



Reporting can take many forms and will be configured to County requirements. Here are a few examples from our customers.

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APPLICATION 2 CASE COORDINATOR USER SEARCH

County of Los Angeles

CASE COORDINATOR DASHBOARD

SEARCH	10/04/21	10/04/21	10/04/21	10/04	10/04	10/04
SEARCH	0	0	0	0	0	0

SEARCH	10/04/21	10/04/21	10/04/21	10/04/21	10/04/21	10/04/21
SEARCH	0	0	0	0	0	0

Dashboard

The Dashboard consists of 5 different tabs: Category Payments, Payment Details, Vendor Population, Vendor List, and Awards

Filter Bar

Along with these tabs is the filter bar which consists of: Secretariate Selection, Department Selection, Category Selection, and Year Selection.

Also on the filter bar is the Create Report button. This button allows you to generate a report for each specific tab's information. You can generate this ad hoc report into a .CSV or .XLSX file.

Year	Department	Category	Percentage Spent	Benchmark Amount	Payment
2020	ASD	Disability	0%	\$0.00	\$0.00
2020	ASD	USBTRE	0%	\$0.00	\$0.00
2020	ASD	MBE	0%	\$148,450	\$148,450
2020	ASD	SBPP	89.15%	\$706,360	\$706,360
2020	ASD	Veteran	0%	\$269,420	\$269,420
2020	ASD	WBE	21.02%	\$1,217,270	\$1,217,270
2020	ASD	Disability	0%	\$0.00	\$0.00
2020	ASD	USBTRE	0%	\$0.00	\$0.00
2020	ASD	MBE	1,185.26%	\$11,711,340	\$11,711,340
2020	ASD	SBPP	2,887.81%	\$6,460,910	\$6,460,910
2020	ASD	Veteran	0%	\$1,491,370	\$1,491,370
2020	ASD	WBE	660.64%	\$27,494,810	\$27,494,810
2020	ASD	Disability	0%	\$0.00	\$0.00
2020	ASD	USBTRE	0%	\$0.00	\$0.00

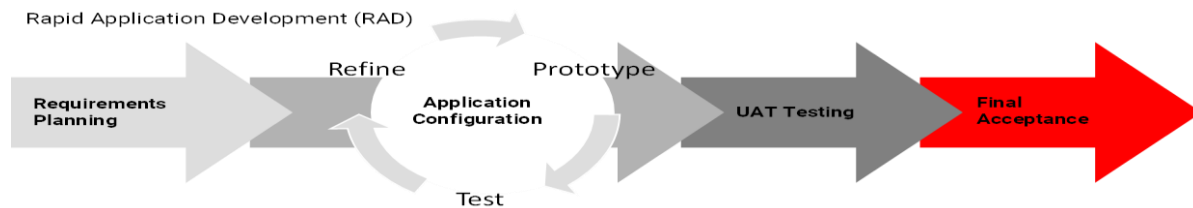
All data can be exported in several formats including Microsoft Excel and PDFs. No plug-in is required. Reports can also be printed.

B. Quality Assurance Capabilities

Our Customer Success Team is very detailed when it comes to testing, and we pride ourselves on delivering “clean” applications to our customers. We realize that the best designed system, with poor execution is worthless!

As described earlier, the County will have separate Development, Test/UAT & Production environments hosted in our secure Autocene Cloud on AWS. This combined with our Rapid Application Development methodology ensures that County application modules will be tested several times prior to going into production.

That RAD development graphic below shows how our people will configure/reconfigure existing Autocene modules, provide it to your County team, then take any feedback and make changes. That process continues until your County team has an application that functions exactly the way you need it to. This provides the ability for our team, and the County team to test at every step in the process!



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When all of the modules are ready to be combined and be tested as a whole, we work with your team to test every single component during UAT. Your team will be doing the testing, but our Customer Success Team will be available any time there is an issue found. We have scheduled a full month for this process in the project plan.

Training

We find that a multi-media approach to training resources works best for our customers. We also find that providing comprehensive training upfront enhances the usage of the system and reduces support calls, so it's in everyone's best interest to provide the best possible application training for your people. Here are the components:

Training and Other Resources

- A. Web-based training of County staff members
- B. Web-based training sessions for external users (like your referral partners) provided in conjunction with County staff
- C. Creation of written step-by-step documentation to be used as a reference guide for County staff
- D. Creation of written step-by-step documentation to be used as a reference guide for external users
- E. Creation of system overview videos for both County staff & external users
- F. Web-based Administrator Training and written system management documentation

Note: The Autocene Enterprise Premier Support plan will provide telephone application

support for your County staff and external users if required. See the Support & Maint. section below.

See the attached User Guide for the Massachusetts Supplier Diversity Office as an example of written documentation provided by our team.

Also, see one of the [Training Videos](#) created by our team in conjunction with the SDO.

Support & Maintenance

Your subscription provides Humboldt County with all of the Updates and Upgrades to the Autocene platform as they become available.

In our proposal, we've included our Autocene Enterprise Premier Support Plan. This provides a dedicated Customer Success Manager for the County along with a shortened guaranteed response time, and an escalation path for your staff that includes our Autocene senior technical management.

With that support plan, we have also **included up to 20 hours of professional services each month**. Those hours can be used for changes/edits to the County system, and/or for minor enhancements. Our customers love this approach, in that it eliminates the need for multiple small change orders.

Please see the attached overview document and the brief summary below. We supply the same type of support to several agencies & departments in Massachusetts), multiple agencies & departments in Connecticut, New York City, San Jose, CA and other government customers.

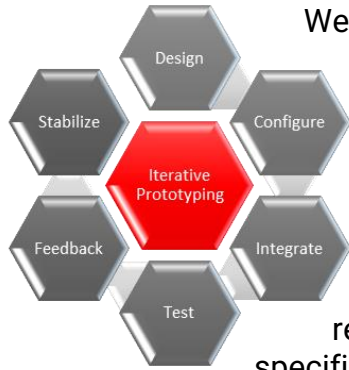
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	FEATURES	INCLUDED
GUIDANCE	Technical Customer Success Team Dedicated resource and first point of contact for any technical questions or support issues	✓
	Autocene Support Center Self-service resources to find answers, access the Support Community or submit a case	✓
SUPPORT	System Availability Monitoring 24/7 access to real-time system status and notifications	✓
	Online Case Management Submit cases and view the status online	✓
	Target Initial Response Time A 2-hour response time for new cases submitted by Enterprise Premier customers	2 hours
	Global Emergency Support A 30-minute response time for Severity 1 technical incidents	30 minutes
	Proactive Monitoring Ongoing tracking and review of cases opened to identify trends, possible issues, or opportunities for improved use of Autocene	✓
	Customer Success Team Access 24/7 email support for your important Autocene applications	✓
	Live Phone Support Ability to speak to our Customer Success Team 24/7 to address technical questions and account support	✓
	Escalated Support Direct access to a senior technical resource as part of our standard escalation process	✓
	Third-Party Software Support Support for Autocene integrations or pre-built connectors such as Salesforce, Oracle or Microsoft	✓
	Personalized Administration Course Master the features & functionality to manage your Autocene apps	✓

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Implementation Plan

We have developed a delivery approach that has the end users' experience top-of-mind, whether it relates to their experience during the implementation or their experience when using the tool. Therefore, we developed a holistic approach that not only focuses on the end state technical solution, but one that also has a strong emphasis on Project Management and Change Management. We believe that the journey to the future state is just as important as the future state itself.



We understand that these types of projects will change the way groups operate across the County. We also understand that each group is currently at a different level of maturity in the way they apply processes, transfer data, report on performance, or utilize various tools and technology. As such, our proposed approach takes into account the varying levels of maturity as we implement the solution by leveraging an iterative prototyping methodology, allowing our team to reconfigure existing application modules to meet the County's specific requirements. To maximize user adoption, prototypes will first

be rolled out to those groups within the County that are more mature from a readiness perspective. Using this approach will allow for testing of each module/prototype as it is reconfigured & completed. So, all system components are reviewed and tested by your team multiple times prior to User Acceptance Testing (UAT).

Implementing a system like this is the perfect opportunity for your staff to revisit their business processes and workflows. Our experienced team has gone through this process with dozens of organizations similar to yours. Our team will work with your staff to "re-think" or "re-engineer" workflows and use the Autocene system automate them.

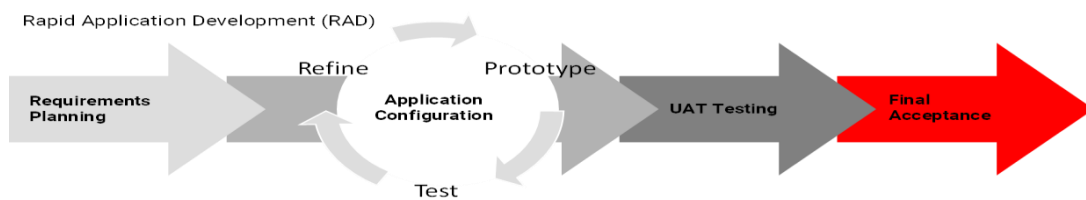
We feel that this is a great way for knowledge transfer and the sharing of best practices that we've found over the years of experience our team has in this field.

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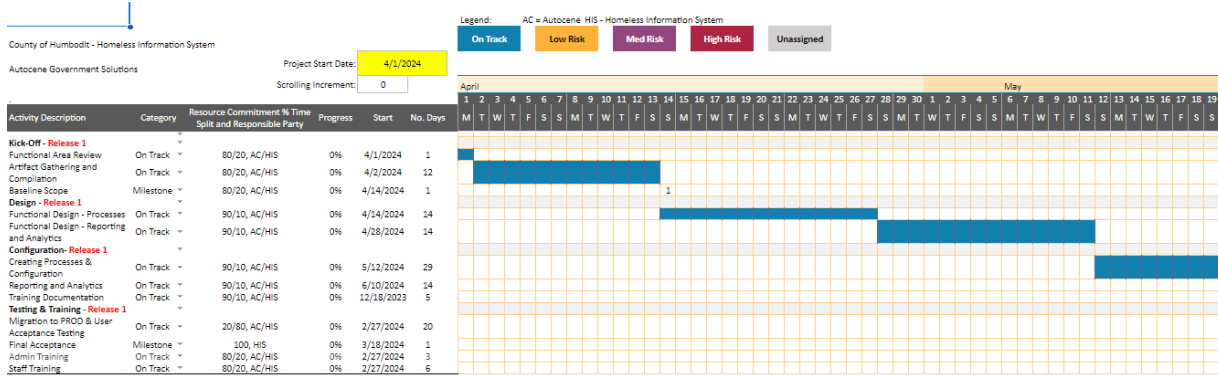
One of the great things about using an HMIS created with a no-code platform like Autocene, is the modular approach, and the ability to quickly make changes to meet the County's specific needs. Our team will be starting with case management & HMIS modules that have already been created, and then modify & reconfigure those based on the feedback received from your team.

Master Schedule (MS)

Below is a sample of the steps Autocene takes, and how we approach an implementation.



Please note: Because we already have many of the modules already in operation with organizations in Massachusetts, Connecticut, California and Washington State, the work will be simply configuring the system to County's requirements. You can see the estimated timeline for the system to be up and running is just under 120 days, with a phased approach that allows ample time for review and UAT testing.



Our Customer Success Team utilizes a Rapid Configuration methodology which provides your teams with the opportunity to test as each module of the compliance system is configured. We use this same approach with the compliance system created for the Massachusetts Supplier Diversity Office.

Project Management Plan

Our Team will develop and maintain a Project Management Plan to support execution of the project within budget, within scope, and within time. The Project Management Plan will include:

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- Communication plan
- Project objective and goals
- Delivery organization team members (including sub-consultants) with contact information
- Roles and responsibilities for all project members
- Detailed, resource and cost loaded project schedule including but not limited to project deliverables, milestones, deadlines, review periods, resource assignments, effort and cost estimates, and actual effort and costs
- Issue and risk registers including analysis and management plans
- Status update cadence and responsibilities
- Stakeholder management plan
- Action item log
- Decision log
- Quality assurance / quality control plan

Our Team will utilize a project management system to generate inputs to the Project Management Plan. This system will be accessible by all project team members and will serve as a 'one-stop shop' for all project-related information and documentation. Within the system, the project schedule will reflect all tasks and sub-tasks with dependencies and constraints, planned work, resource assignments with labor hour and cost estimates, actual time tracking, activity progress, and schedule and cost performance.

The Project Manager is responsible for ongoing maintenance of the Project Management

Plan and is accountable to the Client Lead. The Project Manager will assign activities to Analysts and Technical Consultants based on their expertise and background. The Project Manager will continually monitor team member activities and progress and will have the authority to make changes as needed to ensure on time and on budget delivery of quality work products.

Communication Plan

For the County, our Team will develop for approval a communication plan that fits the individual needs of this Project. Autocene will employ best standard practices for communication based on the Project Management Body of Knowledge (PMBOK). During the early planning phase, our Team will gather all communication requirements as inputs to the project communication plan which will be composed of the following:

- Who receives communication?
- Who delivers and responds to Communication Content?
- When is the communication sent?
- How will the communication be sent?
- List of all communications

Our Team feels it is imperative to have all stakeholders provide input when the communication plan is under development, as a solid communication plan will set the foundation for project success. Through prior and current success at large government Agencies, our Team realizes different levels of content must be communicated to different parties at different times. From executive-level dashboards to detailed milestone reports and quantitative risk analyses, we ensure each stakeholder receives the information most useful in a succinct, easily digestible manner at the right time.

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Project Status Meetings

The Project Manager will maintain ongoing communication with designated County points of contact to ensure full visibility into project progress. Autocene will facilitate status meetings with the County as requested. We find that weekly meetings during the development process work best. Those meetings provide progress on scope and schedule; and discuss high priority issues and risks. The Project Manager will work with your team to publish agendas and minutes for all meetings and will record and track progress on all action items.

Monthly Status Report

Status reports to focus on the key elements pertinent to the Project. Key components of the status report include:

- Dashboard traffic light indicator to quickly identify performance status and areas of concern
- Key accomplishments for the current period and upcoming activities

- Areas requiring County attention and recommended mitigation actions
- Plan vs. actual schedule
- Key risks and issues

Risk Management

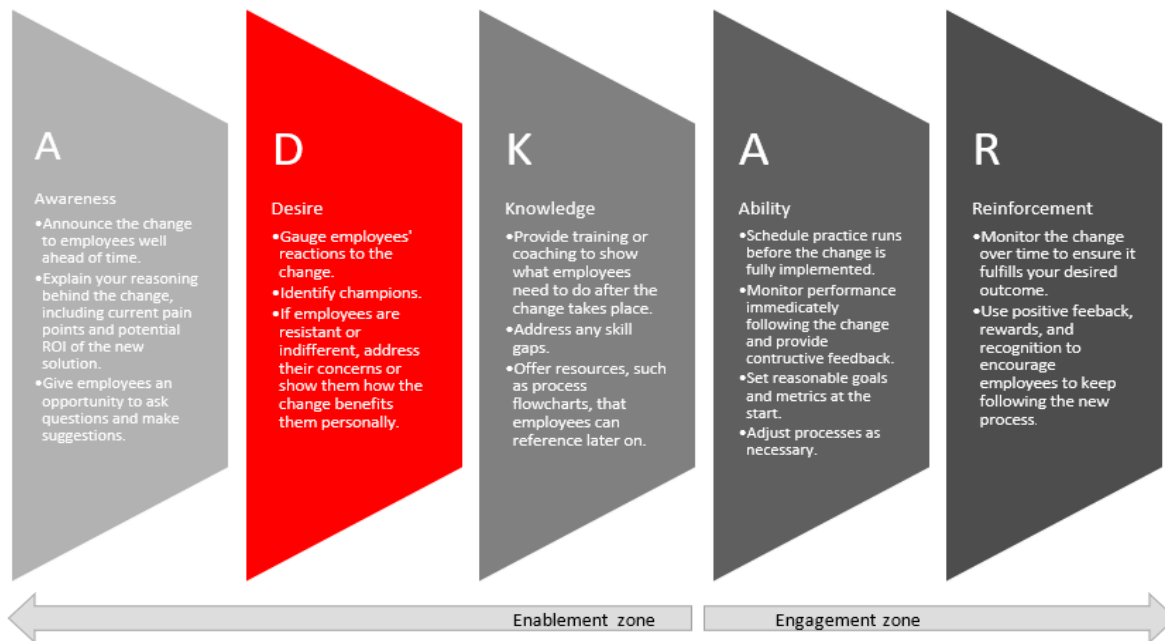
Our team has a long history of following disciplined processes to control risk involved with IT engagements. At Project initiation, we will create a list of Project risks and develop mitigation strategies associated with each. These risks will be communicated to the stakeholders along with severity estimates. This risk management matrix will be updated as the Project proceeds, and the status of open risk elements will be communicated at the regularly scheduled status meetings. We understand the importance of a predictable, reliable methodology on a Project of this scope and will implement effective risk management controls to improve the overall stability and success of the engagement.

Organizational Change

Model for Change Management

In general, our Team subscribes to the ADKAR Model for Change Management. Our project management approach described below in the next section supports that approach. We will work with the County to fully flesh out a change management plan that is appropriate for this initiative.

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Our team has lead capital program business transformations which include standards,

procedures, tools, OCM and training for technology implementation projects at a number of large agencies. In our experience, we have found that the most successful strategy is to have continuous engagement with the Departments to gather feedback as the solution is being configured. As Departments will have potential competing timelines and agendas, a collaborative project management approach will be crucial to completing the project within scope, on time, on budget, and with a high level of adoption post implementation.

6.0 Cost Proposal

This software is already built. Implementation will consist of configuring the system to County requirements, not the building of an application. Therefore, you will see that the implementation costs are low. Also, please note that we will commit to holding pricing at the initial rate for a period of three years.

COST ITEM	Year 1	Year 2	Year 3
Autocene Homeless Management Information System (Annual Subscription)	\$41,940	\$41,940	\$41,940
Implementation – Flat Fee (Initial setup and configuration to County's specific requirements)	\$20,000		
Training (Includes County staff, and Referral Partners)	Included	Included	Included
Autocene Enterprise Premier Support	\$23,940	\$23,940	\$23,940
TOTAL	\$85,880	\$65,880	\$65,880

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REQUEST FOR PROPOSALS NO. DHHS2023-03**HOMELESS MANAGEMENT INFORMATION SYSTEM ATTACHMENT B – COST PROPOSAL FORM**

Itemize all costs that will be incurred by the County for the provision of Services set forth in RFP No. DHHS2023-03. Price Quotes shall include any and all costs associated with the provision of such Services. A narrative should be attached to clarify any pricing data submitted.

A. Personnel Costs – FLAT FEE IMPLEMENTATION COST – ONE TIME	
Title: CUSTOMER SUCCESS TEAM	\$20,000.00
Salary Calculation:	
Duties Description: Configuration and implementation of System	
Total Personnel Costs:	\$20,000.00
Title:	
Salary Calculation:	
Duties Description:	
B. Operational Costs – ANNUAL SUBSCRIPTIONS	
Item: AUTOCENE SOFTWARE	\$41,940.00
Description: AUTOCENE ANNUAL SUBSCRIPTIONS	
Item: ENTERPRISE PREMIER	\$23,940.00
Description: AUTOCENE Enterprise Premier Support Plan (Includes up to 20hours of professional services each month)	
Total Operational Costs:	65,880.00
C. Consumables/Supplies	
Item: NONE	
Description: NONE	
Total Consumable/Supplies:	\$0.00
D. Transportation/Travel	
Title: NONE	
Description: All Services will be provided remotely.	
Total Transportation/Travel:	\$0.00
E. Other Costs	
Item: NONE	
Description: NONE	
Total Other Costs:	\$0.00
F. Indirect Costs	
Item: NONE	
Description: NONE	
Total Indirect Cost:	\$0.00
Grant Total:	\$85,880.00

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Personnel Costs: Include all employee costs, but not those incurred by independent contractors, with each employee type listed separately. Examples of calculations are: Fifteen percent (15%) of Two Thousand Dollars (\$2,000.00) per month, multiplied by six (6) months; or Twenty (20) hours multiplied by Fifteen Dollars (\$15.00) per hour, multiplied by fifty-two (52) weeks plus any applicable benefits.

Operational Costs: Include any and all direct and indirect expenses associated with the proposed outreach, engagement, behavioral health treatment and social rehabilitation services, except consumable supplies and travel, including, without limitation rent, office supplies, postage, paper, communications, equipment, contract labor or services and overhead or administrative costs, with each cost type listed separately.

Consumable Costs: Include any and all items that will be consumed by participants or staff, including, without limitation, food and meeting supplies.

Transportation Costs: Include any and all vehicle purchase and/or rental costs, employee per-mile reimbursements and other travel-related expenses.

Other Costs: Include anything not already covered in the budget categories above, with each such expense listed separately.

Overhead and Administrative Costs: Per federal guidance, overhead and administrative costs may not exceed ten percent of (10%) of the total modified costs.

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[7.0 Supplemental Documentation](#)

See Attached Supplemental Information.

8.0 References

**REQUEST FOR PROPOSALS NO. DHHS2023-03
HOMELESS MANAGEMENT INFORMATION SYSTEM
ATTACHMENT C – REFERENCE DATA SHEET
(Submit with Proposal)**

REFERENCE DATA SHEET		
Provide a minimum of two (2) references with name, address, contact person and telephone number whose scope of business or services is similar to those of Humboldt County (preferably in California). Previous business with the Humboldt County does not qualify.		
NAME OF AGENCY:	Massachusetts Executive Office of Housing & Livable Communities	
STREET ADDRESS:	100 Cambridge Street, Suite 300	
CITY, STATE, ZIP:	Boston, MA 02114 USA	
CONTACT PERSON:	Nick Monllos	EMAIL: Nick.monllos@state.ma.us
PHONE #:	+1 617.573.1148	FAX #:
Department Name:	EOHLC	
Approximate County (Agency) Population:	7 million	
Number of Departments:	6	
General Description of Scope of Work:	<p>Development of a portal for vendor management and the selection of architects & engineers for DHCD building & restoration projects.</p> <p>The portal includes streamlining the application process for designers, and integration with DHCD's project management system to provide extensive reporting.</p>	
REFERENCE DATA SHEET		
NAME OF AGENCY:	Connecticut Health & Education Finance Authority (CHEFA)	
STREET ADDRESS:	10 Columbus Blvd Hartford,	
CITY, STATE, ZIP:	CT 06106-1978	
CONTACT PERSON:	Rob Blake	EMAIL: RBlake@chefa.com
PHONE #:	+1 203.715.6661	FAX #:

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Department Name:	IT & Cyber Security	
Approximate County (Agency) Population:	3.6 million	
Number of Departments:	5	
General Description of Scope of Work:	<p>This covers a complete process around the application, review and provision of Loans and Bond issuances for hospitals, universities & independent school systems in the State.</p> <p>This project has multiple processes & reports, all requiring the integration of multiple data sources and the generation of essential reports & oversight for the firm</p>	
Applicant Tracking System Implementation Date:		
NAME OF AGENCY:	Massachusetts Supplier Diversity Office (SDO)	
STREET ADDRESS:	One Ashburton Place Boston,	
CITY, STATE, ZIP:	MA 02108	
CONTACT PERSON:	Doreen Cameron	EMAIL: Doreen.l.cameron@state.ma.us
PHONE #:	+1 617.502.8843	FAX #:
Department Name:	Supplier Diversity Office	
Approximate County (Agency) Population:	7 million	
Number of Departments:	153	
General Description of Scope of Work:	<p>Development of a portal (Supplier Diversity Hub) for collecting information on the State's spend with Diverse Business Entities. The portal is also used to drive additional business opportunities to those diverse firms.</p> <p>The project required the integration of Autocene with 5 different Commonwealth financial systems.</p> <p>https://www.capterra.com/p/152294/Autocene/#reviews</p>	

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9.0 Evidence of Insurability and Business Licensure



AUTOINC-03

MINED1

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
3/30/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER License # 0C41366 Granite Professional Insurance Brokerage, Inc. 360 Lindbergh Avenue Livermore, CA 94551	CONTACT NAME PHONE (A/C, No, Ext): (925) 462-8400 FAX (A/C, No): (925) 462-8888 E-MAIL ADDRESS: commercial@graniteins.com	
	INSURER(S) AFFORDING COVERAGE INSURER A: Sentinel Insurance Company NAIC # 11000 INSURER B: Sequoia Insurance Company 22985 INSURER C: Palomar Excess and Surplus Insurance Company 20338 INSURER D: INSURER E: INSURER F:	
INSURED Autocene Inc. 2010 Crow Canyon Dr. Suite 100 San Ramon, CA 94583		

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INBR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Hired/Non-Owned <input checked="" type="checkbox"/> Auto Liability GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input type="checkbox"/> PRO <input type="checkbox"/> LOC OTHER:			76SBUBH9419	1/24/2023	1/24/2024	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMPIOP AGG \$ 4,000,000
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED <input type="checkbox"/> AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY <input type="checkbox"/> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		Y/N	QWC1268535	3/30/2023	3/30/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Cyber Liability			PLM-CB-SLNYDMJ4Y-002	2/11/2023	2/11/2024	Policy Agg Limit 2,000,000
A	Tech E & O			76SBUBH9419	1/24/2023	1/24/2024	Policy Agg Limit 4,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks & schedule, may be attached if more space is required)
 The attached forms apply as required per written contract or written agreements between the listed parties and the insured, which are subject to the policy provisions. In the absence of such written contract or written agreement the attached form may not be applicable.

CERTIFICATE HOLDER Proof of Insurance Only	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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ACORD 25 (2016/03)

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10.0 Exceptions, Objections and Requested Changes

Autocene has no exceptions or objections to this RFP or the Sample Agreement.

Required Attachments

Please see attached:

Attachment 1 – RFP Signature Affidavit (page 4)

Attachment 2 – Cost Proposal (page 39)

Attachment 3 – Supplemental Documentation (page 41)

Attachment 4 – Reference Data Sheet (page 42)

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