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# Request for Proposal

No. DHHS2023-03

Homeless Management Information System

**Response to:** County of Humboldt

**Prepared by**
Eccovia, Inc. dba Eccovia
2150 W. Parkway Blvd. Suite A-101
Salt Lake City, UT 84119
eccovia.com

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# Cover Letter

**To the County of Humboldt Governing Board** :

Enclosed is our response for the County of Humboldt Homeless Management Information System.

Our comprehensive Homeless Information Management System will allow the County's stakeholders to better serve its citizens through accurate intake tracking and registration, eligibility management, closed-loop referrals as well as reporting on client outcomes across multiple agencies.

For over two decades, Eccovia has driven innovation in technology supporting the vulnerable people in our communities with our HMIS platform. Today, Eccovia stands as a leader in the Case Management Information Systems SaaS industry, serving over 1,300 health and human services organizations in 33 states, Washington DC, Puerto Rico, and the Virgin Islands.

Eccovia is pleased to present our suite of products for the County. Your HMIS solution will consist of the following elements:

1. **ClientTrack.** Our advanced case management software that empowers workforce services organizations to meet the needs of employers, jobseekers, and entire communities. The ClientTrack platform enables collaboration with multiple agencies and programs to maintain a whole-person care view of an individual and provide key information about jobs, training opportunities, and other support services to employers and other partner agencies.
2. **Azure Advanced Analytics.** An Azure SQL copy of your production database that can be connected to analytics tools such as Microsoft Power BI or Tableau. Azure Advanced Analytics makes it possible for your organization to access ClientTrack production data without worrying about causing performance issues for your users.
3. **Designer Toolset.** Enables authorized administrators to configure their solution without the need for code changes. As business and regulation needs evolve, administrators can easily adapt their ClientTrack solution.
4. **Interactive Public-Facing Dashboards.** Highlights trends and patterns in a simple user-friendly way. Allows the public to access self-service analytics and helps your organization communicate with the public, engage with stakeholders and improve decision making.

Eccovia is headquartered at 2150 W. Parkway Blvd, Suite A-101, Salt Lake City, UT 84119. Mark Lorenzen, Enterprise Account Executive, will be your primary point of contact (801-305—4613, mklorenzen@eccovia.com).

Please accept the information provided in this document as our response to your RFP for a Homeless Management Information System.

With Best Regards,

**Steve Taylor**
President, Eccovia, Inc.

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

| **REQUEST FOR PROPOSALS – NO. DHHS2023-03<br>SIGNATURE AFFIDAVIT** | |
|---|---|
| **NAME OF ORGANIZATION/AGENCY:** | Eccovia, Inc. |
| **STREET ADDRESS:** | 2150 W. Parkway Blvd, Suite A-101 |
| **CITY, STATE, ZIP** | Salt Lake City, UT 84119 |
| **CONTACT PERSON:** | Curtis Murray |
| **PHONE #:** | 801-290-5502 |
| **FAX #:** | N/A |
| **EMAIL:** | cmurray@eccovia.com |

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.

________________________________
Signature

**_President**___________________________
Title

**_Steve Taylor**________________________
Name

**_10/20/2023**_________________________
Date

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

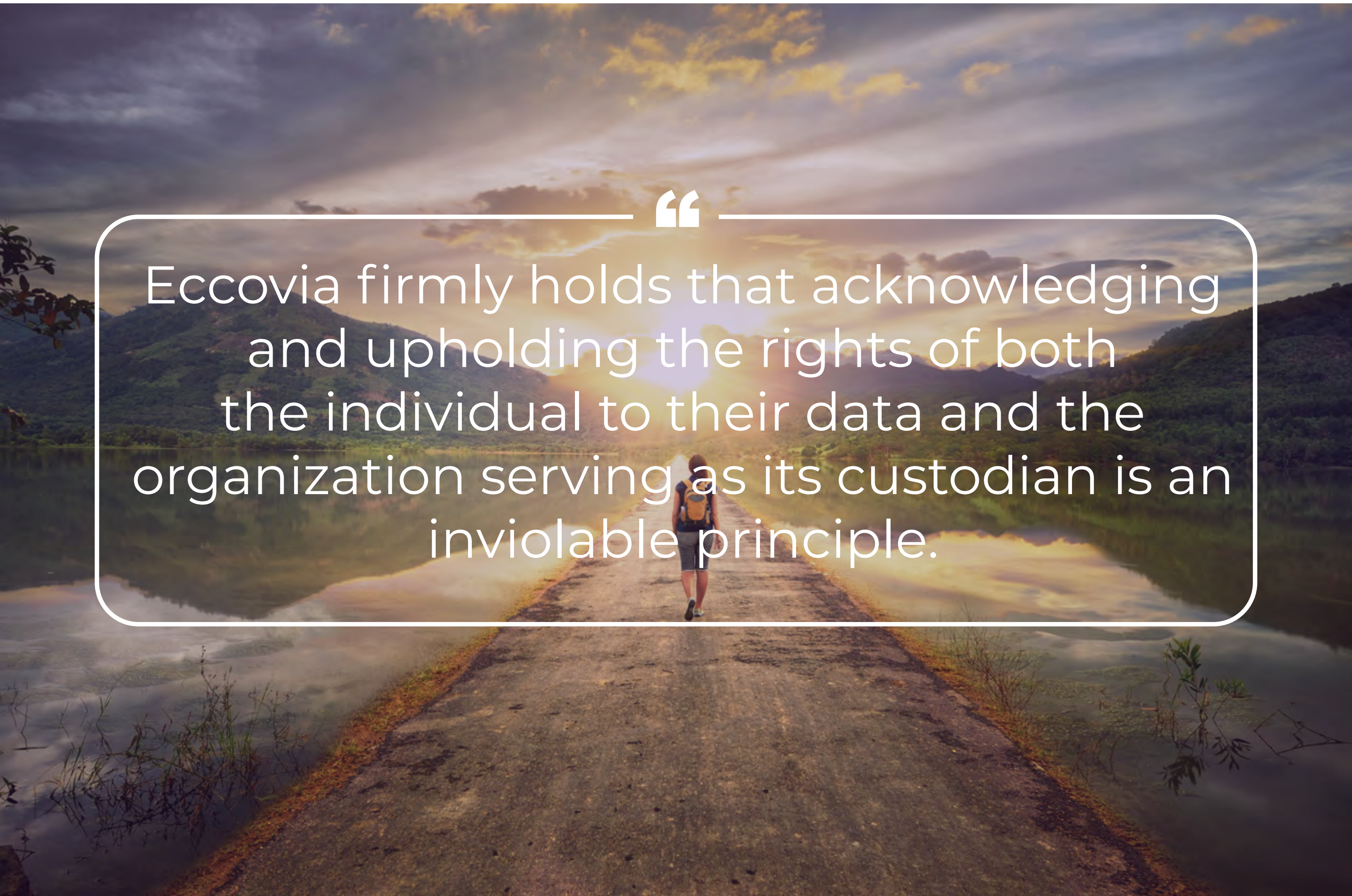
## ECCOVIA'S DATA PHILOSOPHY

### DATA OWNERSHIP

At the core of Eccovia's data management philosophy is the belief that data is not just information, but an extension of the individual. Within this philosophy, the question of data ownership transcends mere legalities and delves into the very essence of individual rights and autonomy. Eccovia firmly holds that acknowledging and upholding the rights of both the individual to their data and the organization serving as its custodian is an inviolable principle.

The transformative potential of data is realized by establishing clear ownership and delineating the associated rights. This serves a dual purpose: to nurture the well-being of each individual by ensuring that their data remains under their control, and simultaneously enabling the extraction of collective insights and trends from aggregated data. In this symbiotic relationship, the organization acts as a steward, entrusted with the responsibility to safeguard the individual's data while harnessing the power of data-driven insights to achieve greater outcomes.

Eccovia's commitment to data ownership and individual agency informs every aspect of its practices, technologies, and partnerships. By prioritizing the sanctity of data ownership, Eccovia not only empowers individuals with control over their personal information, but also fosters a culture of transparency, accountability, and ethical data utilization. This approach resonates with the larger narrative of data's potential—enabling personalized care, informed decision-making, and societal progress through a balance between individual rights and the collective pursuit of knowledge.




## DATA SOVEREIGNTY

Over the last three decades of providing case management and solutions serving a diverse range of vulnerable populations, Eccovia has developed an in-depth understanding of the importance of data sovereignty. Eccovia has extensive experience working with Indigenous Americans and is honored to be a partner in supporting tribal data sovereignty efforts. Through our longstanding collaboration with Indigenous American communities, we have witnessed the importance of upholding their rights to control and govern their own data. We are committed to continuing our work to empower Indigenous nations in managing their data, preserving their cultural heritage, and fostering self-determination.

One of Eccovia's foundational principals of data governance is the belief that data represents the digital manifestation of the individual and collective; as such, data must be treated with the same respect as that directed to the person and group. This includes recognition of the sovereign rights of those from whom data is collected. To Eccovia, data sovereignty includes more than just ownership of the data—it includes the right to determine how data is used, who can access it, and the stories told through the data. Ultimately, data sovereignty is about respecting the right to self-determination.

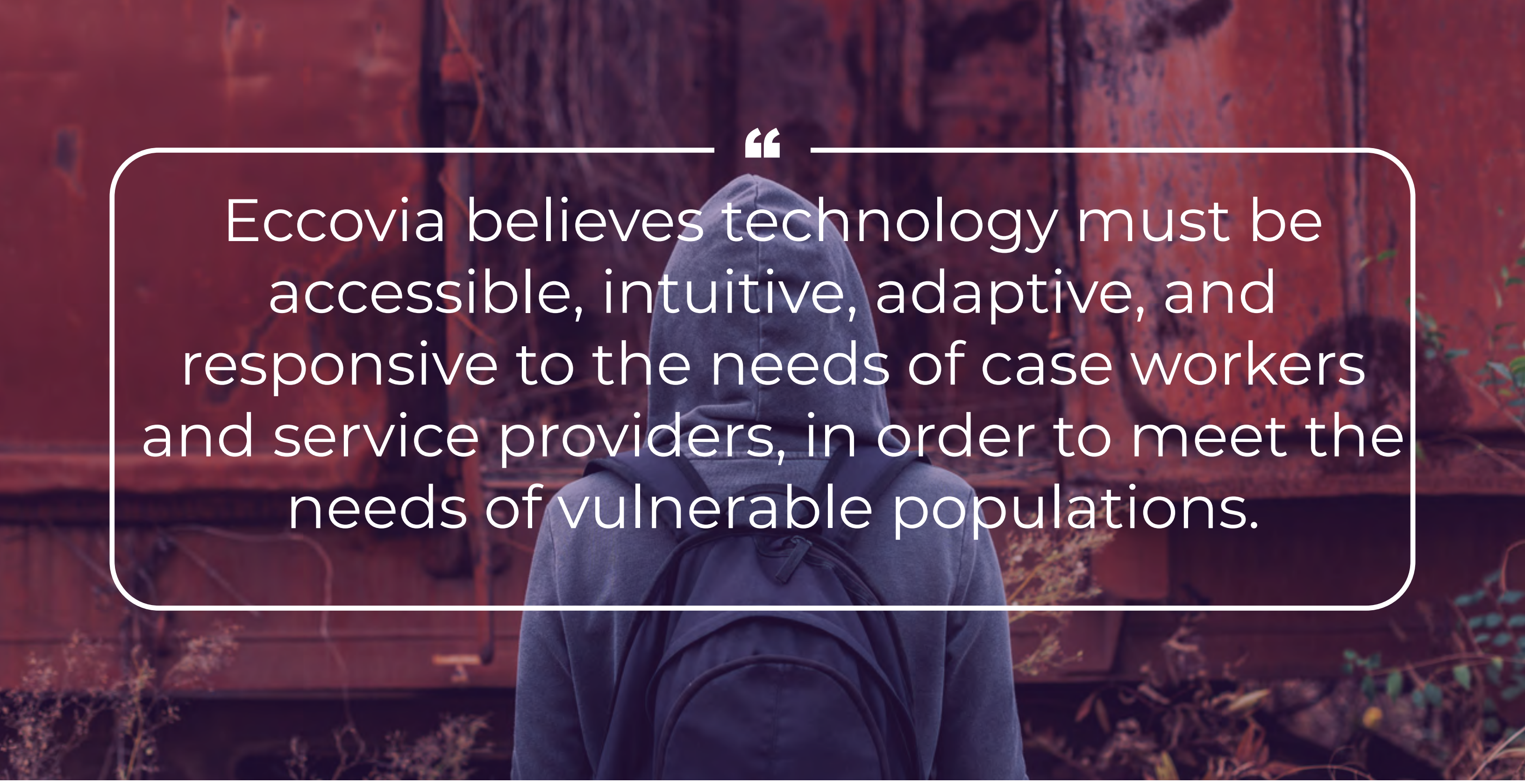
As a key component of effective data governance, a well-defined understanding of data sovereignty ensures technology is best positioned to support the collective needs of Native Americans, which include safeguarding traditional knowledge, empowering community-driven decision-making, and fostering sustainable economic development. By respecting and upholding the sovereign rights of Indigenous communities, technology can play a vital role in strengthening their self-determination and promoting equity. Ultimately, this collaborative approach to data sovereignty enhances the ability of technology to serve as a powerful tool for positive social change and inclusive progress.

## DATA JUSTICE

Eccovia's philosophy of data justice is centered on the fair and equitable treatment of individuals and communities in the collection, use, and management of data. Data is not neutral, and Eccovia recognizes that data collection, analysis, and decision-making processes can and will impact groups differently; at the same time, it is only through the ethical and careful use of data that true social change is possible. The right data dispels misconceptions and brings to light the hard truths that communities must face to address systemic inequity. It also enables the services and interventions needed to uplift marginalized populations, create targeted solutions, and foster evidence-based policies that promote social justice and equal opportunities. In this way, data becomes a powerful tool for empowerment, advocacy, and transformative change, guiding collective efforts to build a more inclusive and equitable society.

The challenge is in finding the right governance model that amplifies the voices of the disadvantaged and addresses the unequal power dynamics present within communities. Effective data governance policy includes careful consideration for how data justice is represented throughout the system governed, including the use of technology, data collection methodologies, privacy safeguards, data sharing agreements, and decision-making processes. By integrating principles of data justice into the fabric of data governance, we can ensure that data practices prioritize fairness, inclusivity, and ethical use, leading to more equitable outcomes and fostering trust between data custodians, communities, and stakeholders.

Eccovia's three decades of expertise working with marginalized populations, coupled with the extensive professional direct service experience of the Eccovia team, ensure a deep understanding of the unique challenges faced by vulnerable communities and our commitment to respecting their data sovereignty rights shape our approach to data management, technology utilization, and service delivery.




## USER EXPERIENCE

The challenges facing the social and health services sector are growing, and resources are becoming more finite; at the same time, the pace of change is becoming increasingly frenetic. With a strong governance structure in place, one which centers the rights of the individual, technological innovation will meet the growing need and ensure that service organizations are prepared for the challenges of today and in the future. Eccovia believes technology must be accessible, intuitive, adaptive, and responsive to the needs of case workers and service providers, in order to meet the needs of vulnerable populations. Eccovia embraces these values in its product philosophy and as guiding principles in the development of its product ecosystem. Eccovia views its clients as strategic partners and stakeholders and vital to the continuous improvement mentality that guides the development of Eccovia's products and services.

To Eccovia, making technology accessible means ensuring that all community contributors, regardless of visual impairment or other conditions, are able to participate. To that end, ClientTrack is 508 compliant. Being accessible also means availability where case management is happening. Eccovia's products, including ClientTrack and ClientInsight, are mobile optimized and available wherever they're needed.

Intuitive technology is that which logically follows workflows and processes established by social service organizations and the community they serve. The limited capacity and growing caseloads faced by social workers also requires that social services technology have a low learning curve and is readily understandable and usable by non-technical audiences.

Technology must also be adaptive to the ever-changing needs of the organization and community. ClientTrack's Designer Toolset empowers communities and makes possible near limitless configurability to accommodate new programs, workflows, assessments, reports, and the other data needs driving modern case management.

Finally, technology must be responsive. Eccovia believes that responsiveness includes features and capabilities that manage many of the rote tasks that detract from relationships with clients. ClientTrack and ClientInsight include a broad range of features intended to automate and manage tasks that sap caseworker capacity and impede the relationship building that is so critical to reaching outcomes.

# Professional Profile

## Organization Overview

### 1 The Proposer's organization name, physical location, mission statement, accreditation, certification and/or licensure status, legal organizational status, such as partnership, corporation or limited liability company, current staffing levels and overall budget.

| | |
|---|---|
| **Organization Name** | Eccovia |
| **Address, City, Zip of business** | 2150 W. Parkway Blvd, Suite A-101, Salt Lake City, UT |
| **Principle place of business** | Salt Lake City, Utah |
| **Mission Statement** | Eccovia's mission is to provide health and social service agencies with technologies and actionable data to better serve their communities. |
| **Legal business status** | C-Corporation |
| **Year entity was organized to do business as the entity now substantially exists** | 1983 |
| **Total number of employees** | 92 Employees |
| **Overall Budget** | As one of the last privately held vendors in the HMIS space, our Articles of Incorporation, By-Laws, financial and budgetary information remains confidential. Once all necessary disclosure documentation is completed, we would be willing to share as requested. |

### 2 Description of the Proposer's current and previous business activities.

Eccovia's journey started in 1983 under the name Data System International. We are a purpose-driven company that creates and develops software to help organizations support the vulnerable populations within their communities. We are in business to improve lives and help humanity thrive. By helping our partners coordinate and integrate with both public and private organizations across every segment of HHS, our services ensure that people are at the center of their care. For 39 years we have used our purpose, mission, and vision statements to guide how we develop our software. We support those who help the vulnerable populations in our communities through case and data management.

Our HMIS platform began serving social service agencies in 1996. In 2002, we evolved into a web based HMIS platform that meets the HUD standards for data collection, privacy, and security. Over the next two decades, Eccovia drove innovation in technology supporting the vulnerable people in our communities with our HMIS platform. Today, Eccovia stands as a leader in the Case Management Information Systems SaaS industry, serving over 1300 health and human services organizations in 33 states, Washington DC, Puerto Rico, and the Virgin Islands.

### 3 A detailed description of any litigation regarding the provision of Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP that has been brought by or against the Proposer, including, without limitation, the nature and result of such litigation, if applicable.

Eccovia does is not a party in any litigation regarding the provision of Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP. Not applicable.

**4 A detailed description of any fraud convictions related to the provision of Homeless Management Information Systems with capabilities pursuant to the terms and conditions of public contracts, if applicable.**

Eccovia does not have any fraud convictions related to the provision of Homeless Management Information Systems with capabilities pursuant to the terms and conditions of public contracts. Not applicable.

**5 A detailed description of any current or prior debarments, suspensions or other ineligibility to participate in public contracts, if applicable.**

Eccovia does not have any current or prior debarments, suspensions or other ineligibility to participate in public contracts. Not Applicable.

**6 A detailed description of any violations of local, state and/or federal regulatory requirements, if applicable.**

Eccovia does not have any violations of local, state and/or federal regulatory requirements. Not Applicable.

**7 A detailed description of any controlling or financial interest the Proposer has in any other organizations, or whether the Proposer's organization is owned or controlled by any other organizations. If the Proposer does not hold a controlling or financial interest in any other organizations, that must be stated.**

As one of the last privately held providers of an industry leading HMIS, Eccovia is not controlled by any other organization. Eccovia does not hold a controlling or financial interest in any other organizations.


## Overview of Qualifications and Experience

**1 A detailed description of the Proposer's overall experience regarding the provision of Homeless Information Systems with capabilities equivalent to those set forth in this RFP, which includes specific examples of the outcomes and successes of such projects.**

Eccovia's HMIS has been providing technological solutions for Health and Human Service organizations since 1996. Our team is committed to working closely with agencies and organizations as they implement new programs and capabilities, ensuring success as they serve individuals in their community.

Eccovia's experience helping agencies and organizations transform processes, improve collaboration, and deliver visionary solutions include City, County, State and Federal partnerships. Our comprehensive public sector segment customers provide input on our product functionality and features. As more government entities move to the cloud, they are partnering with Eccovia to deliver the same functionality and reliability they have with their existing on-premises solutions. Eccovia's ClientTrack platform includes standardized and custom reporting that provide data elements in the format best suited to the programmatic needs of the organization. These partnerships demonstrate Eccovia's unique ability to collaborate with a variety of organizations and expeditiously connect providers from social services, criminal justice, behavioral health, healthcare services, and more. Our ClientTrack solution can be tailored to meet the specific data sharing requirements of any organization and will contribute to improved client outcomes.

We offer a comprehensive, proven, cloud-based case and data management system designed for tracking intake, registration, eligibility, assessment, referrals, follow-up, and reporting on client outcomes within single organizations or across multiple agencies. Our solution offers robust, tailored, and client-centric case management capabilities within the platform. ClientTrack is continuously updated with new features and functionality so our users remain on the forefront of the latest technology. Over 1,300 health and human services organizations have utilized ClientTrack for their case management and data management needs.

**2 Identification of the Proposer's management team, key personnel and subcontractors that will be responsible for providing a Homeless Management Information System with capabilities equivalent to those set forth in this RFP, including, without limitation, any and all applicable organizational charts and/or diagrams.**

Please see a list of the key staff that will play a role in the implementation of our HMIS platform along with our organization chart.

# Key Staff

## Adam Richards

### Dedicated Project Manager

Proven track record in project, implementation and testing management. Years of experience conceiving and transforming vision into reality, objective into action and theory into practice. Strategic planning expertise combined with dynamic leadership, resulting in the efficient operation of product lines and implementation of complex initiatives. Focused problem solver with the aptitude to identify organizational needs, deliver effective solutions and drive results across functional, cross functional and vendor teams.

## Timothy H. Klein

### Head of Client Onboarding

Tim is an accomplished, results-oriented Head of Client Onboarding with a comprehensive background of information technology, product support, business analysis, and client management. His expertise in implementing business requirements into strategic solutions, managing complex project teams and processes, resolving escalated technology issues, and guiding systems performance has made him an asset to internal and customer teams.

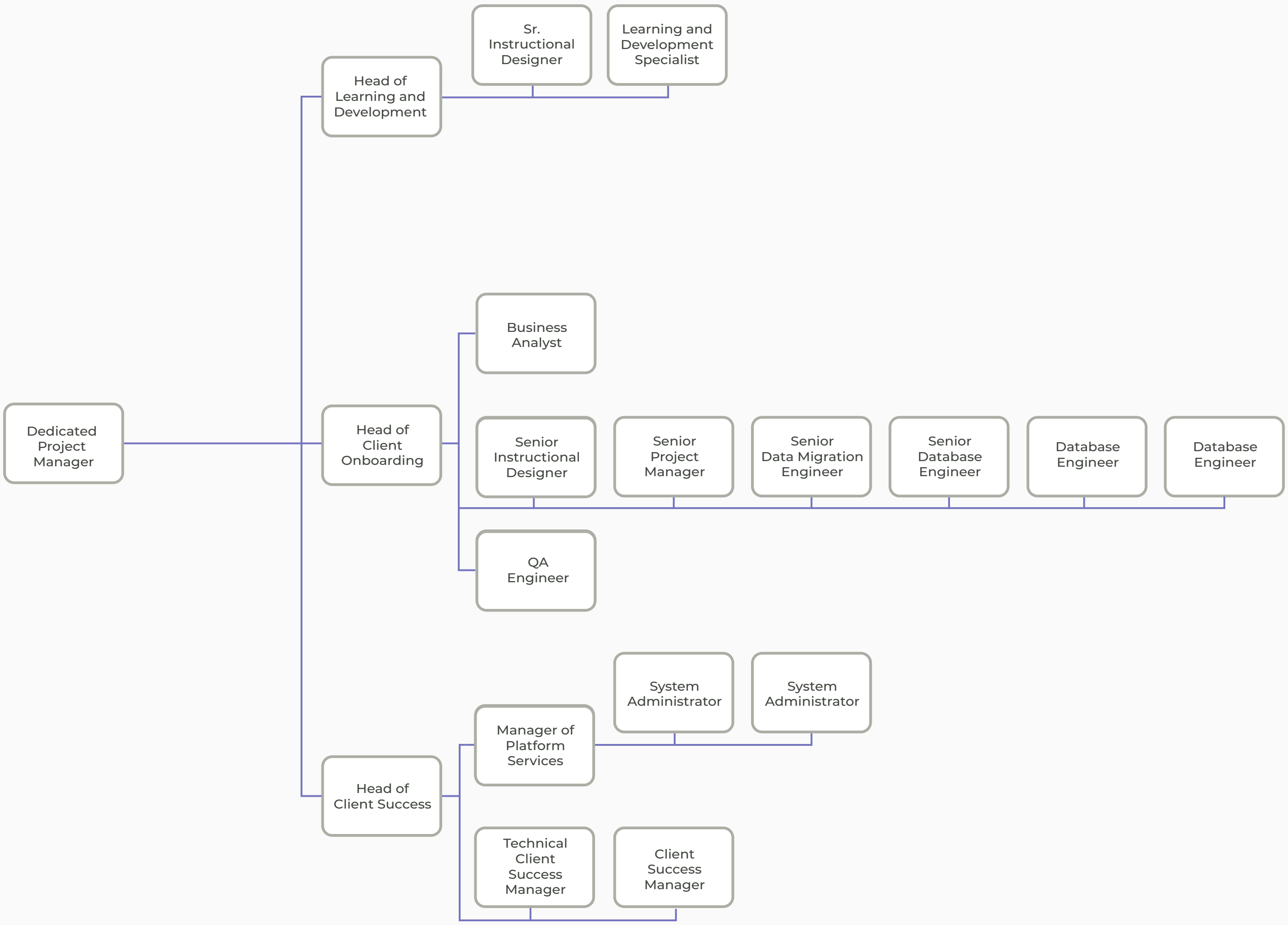
## Alex Munro

### Sr. SQL Engineer / Data Migration Lead

Alex has over ten years of experience with Eccovia, developing the core functionalities on which the ClientTrack software operates. He has overseen the successful implementation of over 200 ClientTrack solutions. Alex has also successfully migrated data from a multitude of differing data structures into ClientTrack and created hundreds of data reports in varying formats and layouts for a wide variety of clients.

eccovia®

# Implementation Team Organizational Chart



**3 A detailed description of the qualifications and experience of key personnel and subcontractors that will be responsible for providing a Homeless Management Information System with capabilities equivalent to those set forth in this RFP, including, without limitation, job titles, responsibilities, special training, licenses, certifications and experience with other governmental agencies.**

Please see the attached resumes of key personnel.

# Steve Taylor

President

*Steve is a strategic thinker, an effective communicator, and an expert in technological development. He can lead teams and develop solutions across an enterprise from idea phase to full-scale implementation. With more than 20 years of professional experience, Steve joined Eccovia in March 2020 as a Chief Information Officer, responsible for overseeing the company's information technology and computer systems. Steve reports directly to the CEO, the CIO is responsible for making executive technology decisions on behalf of Eccovia, including managing budget and making investments to align the company with their vision for its technological needs.*

## Experience

### Chief Information Officer

Eccovia, Salt Lake City, UT

- Delights our customers with world-class support and client success engagement
- Executes Eccovia's strategic product roadmap and meets objectives and metrics
- Proactively manages risks, looks out for new technology opportunities, and maintains a sense of urgency for achieving goals
- Leads the Product, Engineering, Client Success, Support, and Internal IT teams
- Identifies ways to improve and simplify the daily business operations at the people, process, and product levels
- Champions the Eccovia brand and evangelize the mission of our company to all team members
- Establishes review and adjusts goals each quarter at the organization and department levels

## Education

**Regis University**

Computer Science

**Scrum Alliance**

Certified Agile Leadership

**Scaled Agile Framework**

Leading SAFe (4.5), September 2018

## Relevant Skills

- Technology innovation and strategy
- Software architecture and development
- Agile development culture and methodologies
- DevOps culture and strategy
- Software QA and test automation
- Release automation and deployment pipelines
- Establish and coach cross-functional teams

# Adam Richards

Dedicated Project Manager

*Proven track record in project, implementation and testing management. Years of experience conceiving and transforming vision into reality, objective into action and theory into practice. Strategic planning expertise combined with dynamic leadership, resulting in the efficient operation of product lines and implementation of complex initiatives.  Focused problem solver with the aptitude to identify organizational needs, deliver effective solutions and drive results across functional, cross functional and vendor teams.*

## EXPERIENCE

### Project Manager

Eccovia, Salt Lake City, UT

- Leads cross functional team in the delivery of software and assessments to new and existing customer base. Process delivery included the standard SDLC project phases and suite of deliverables relevant to Scope, Schedule and Budget.
- Leads the end-to-end delivery post contract delivery of onboarding of baseline functionality in addition to new product features allowing seamless integration in the Health and Human Services space.
- Owns project plans, scope, and revenue for contracted deliverables.
- Successfully executes project change control protocols with clients leading the sizing and implementation of each change.
- Manages day-to-day PMP / PMI related artifacts including but not limited to Issue Management processes, Communication Management, Project Status Reports, Deliverable Baselines and Environment Management Plans.
- Manages backlog grooming and sprint planning sessions for all contracted work through Professional Services.  Work consisted of data migrations, functional build and integration related delivery.

## Relevant Skills

- Business Intelligence
- Testing/QA/Rollout/ Support
- Client/Business Relations
- Organized
- Implementation Management
- Project Scheduling
- Project Lifecycle Management
- Issue Analysis & Resolution
- Microsoft Office Suite
- Business Strategy and Planning

# David Lewis

Vice President of Strategy

*Accomplished program manager and database administrator with over 12 years of experience in housing and economic development. Proven record of increasing project performance, ensuring department and sub-grantee compliance with grant performance requirements, and developing agency/project-specific IT solutions directed at improving client care and outcomes. Highly skilled in the interpretation and application of laws and policy in the field of human services, health, housing, and information technology.*

## EXPERIENCE

### Vice President of Strategy

Eccovia, Salt Lake City, UT

The Head of Community Engagement focuses on positioning the Eccovia product offerings to capitalize on technology trends within the industry, new and existing client sales for revenue growth, and national advocacy for Eccovia's core market segments. A strategic role in the Eccovia Solutions' business development process, they serve as a subject matter expert and prospective client advisor working with business development resources to understand and identify scope and scale of prospective client implementations. This position is responsible for collaborating with business development resources to identify and prioritize ClientTrack demonstrations. The Head of Community Engagement collaborates closely with Business Development, Marketing, Product, and Engineering. This is a market-facing role that showcases the compelling capabilities associated with developing prospective client business, advocacy, technical case management, and community care coordination needs.

## Relevant Skills

- Highly experienced in a broad range of federal performance and financial management systems, such as HDX, HDX 2.0, Sage, IDIS, eSNAPS, Stella M, Stella P, and the VA Repository.
- Proficient in Microsoft Office Suite, Microsoft SQL Server, Power BI, and SQL-based scripting languages.
- Skilled in a diverse range of data visualization tools, such as Power BI, Tableau, and Looker.
- Highly Experienced with a broad range of federal programs related to housing and homelessness, including: CoC, CDBG, HOME, HEN, HHAA, VA, RHY, PATH, and related programs.

## 4 A detailed description of how the Proposer's qualifications will help meet the County's objective of providing a high-quality Homeless Management Information System.

Since 1996, ClientTrack has helped faith-based, nonprofit, and public entities, provide services to those experiencing homelessness.

The ClientTrack case-management platform began serving social service agencies in 1996. In 2002 we evolved into a web based, HMIS platform that meets the HUD standards for data collection, privacy, and security. For over two decades Eccovia has driven innovation in technology supporting the vulnerable people in our communities with our HMIS, ClientTrack. Today, Eccovia stands as a leader in the Case Management Information Systems SaaS industry serving over 1300 health and human services organizations in 33 states, Washington DC, Puerto Rico, and the Virgin Islands.

Eccovia is a purpose-driven company that creates and develops software to help organizations support the vulnerable populations within their communities. We are in business to improve lives and help humanity thrive. By helping our partners coordinate and integrate with both public and private organizations across every segment of HHS, our services ensure that people are at the center of their care. For 39 years we have used our purpose, mission, and vision statements to guide how we develop our software. We support those who help the vulnerable populations in our communities through case and data management.

Our web based HMIS platform, ClientTrack, was launched in 2002. This suite of software was created, designed and developed by Eccovia. ClientTrack gives users a way to accurately and efficiently coordinate primary care, behavioral health and community-based organizations to provide a whole person care plan for clients. ClientTrack helps bridge the gap between fragmented and siloed elements of care management, bringing all payers, providers, and community resources into a single system.

Eccovia has developed and refined the ClientTrack platform to meet service organizations' diverse and ever-changing needs. Eccovia's team is comprised of social service provider practitioners and subject matter experts in homelessness, housing, and victim services. These experts provide ongoing support to clients, maintain partnerships and working relationships with industry groups and federal partners to keep abreast of developments and updates to requirements and best practices, and contribute to the ongoing innovation and development of ClientTrack.

Eccovia's implementation methodology is constructed to deliver an efficient and streamlined process. Our implementation procedures have been developed through of years of work and experience in the Social and Human Services arena, as well as information technology best practices. The County of Humboldt will be assigned a Project Manager who will use the Software Delivery Lifecycle methodology and industry-best practices as the process for planning, creating, testing, and deploying your solution. Your dedicated Project Manager has the overall authority and responsibility for managing and executing this project according to the project plan. The County of Humboldt project team will consist of Eccovia personnel from engineering, quality assurance, configurations, cloud infrastructure, and database groups. The project manager will coordinate all resources to manage the planning, design, development, testing, end-user training and deployment of the solution.

A Communication Management Plan will be established to define the methods and frequency of communication for the project. This document will be a tool used to represent the agreement between Eccovia and County of Humboldt regarding the project approach and method. A strict communication cadence will ensure alignment toward the project goals and objectives. It will serve as a guide for communications throughout the life of the project and will be updated as communication needs change. This plan will also identify and define the roles of persons involved in this project.

Upon award, Eccovia will lead User Story Workshops where epics and user stories associated with the deliverable are identified, facilitating the setup of the project's backlog. User stories will be prioritized from both client and technical value perspectives. Initial backlog refinement will include the discussion of the details for highest priority stories. These stories will be queued up for the initial development sprints with the highest priority stories getting assigned to the sprint. Project epics will be broken down into multiple stories which will be completed each sprint. Throughout this process, two-week sprint cycles will be conducted to continuously deliver the solution deliverables and requirements.

Throughout a deliverable's timeline, the backlog will be continually refined with the highest priority stories being placed at the top, and the necessary conversations between stakeholders and the development team taking place to provide clarity to development teams. Stories discovered throughout the development process will be added to the backlog. Sprints will select stories from the top of the backlog. User stories that are identified and classified as not being included in the final Scope of Work may be set aside and addressed later, or alternatively the change control process can be initiated by the Project Manager to include selected changes in the solution. The change control process includes documentation of changes from the original scope that are agreed to by both County of Humboldt and Eccovia. Prioritization will be utilized to identify any changes to the project schedule and provide updates as part of the Finalized Project Plan.

During implementation, the Client Onboarding team will stand up a training environment and provide access. The solution is thoroughly tested through Eccovia's Quality Assurance and User Acceptance Testing (UAT) processes. The activities defined above are managed and communicated through the Project Manager. The project will be organized into bodies of work that match key contract deliverables. These bodies of work are defined as epics. The units of work included in each epic are linked to user stories. User stories depict the various roles, workflows, principles and needs of the State to ensure Eccovia's solution is configured correctly and efficiently supports County of Humboldt processes. The epics will be established as the framework for project delivery and shown during the project kick-off call. This framework will be included with the project control documents provided to all project stakeholders.

Upon completion of the QA activities, the solution will be released for optional User Acceptance Testing. During UAT, a dedicated user group consisting of subject matter experts and end users will validate the solution against the approved requirements.

# Project Description

## Description of Services

### 1 A detailed description of the Homeless Management Information System that will be provided pursuant to the terms and conditions of the final Professional Services Agreement resulting from this RFP.

ClientTrack is a holistic HMIS platform that provides coordinated access to record, update, and report on data. Our advanced case management software empowers organizations to meet the needs of their clients by enabling collaboration with multiple agencies and programs to maintain a whole person views of individuals and provide key information about their needs and goals.

ClientTrack is a web application that can be used securely on any device, including personal computers, laptops, smartphones, and tablets. ClientTrack's responsive design ensures that the interface is optimized to compensate for a smaller screen, which means that users of mobile devices remain fully functional when they are accessing the system through any web browser.

Intuitive and comprehensive referral capabilities are a core component of ClientTrack's complete care coordination solution. Before initiating a referral, ClientTrack's Eligibility Engine evaluates client data to determine eligibility with established projects, programs, and services; thus, ensuring that each referral correctly aligns with the client's needs. The entire process, from evaluation of eligibility criteria, referral initiation, and outcome entered by the receiving service provider, is presented in an easy-to-use user interface. Being optimized for mobile use, ClientTrack supports referrals wherever case management occurs.

ClientTrack's intake process includes an embedded step that checks the database for possible duplicates. The system searches for similar sounding names that may have been spelled differently (e.g. Jon and John). ClientTrack can also use unique identifiers such as client aliases, social security number, birth date to check for duplicate entries. In the event duplicates are identified, ClientTrack provides a Client Merge tool.

ClientTrack is highly configurable with advanced features accessible by trained administrators. ClientTrack's Designer toolset, which provides the flexibility to edit existing or create custom fields, forms, workflows, reports, and security models (including role-based access levels and organization/division sharing rules) that follow business rules and processes, also allows for future extensibility managed locally. As business and regulation needs evolve, administrators can adapt their ClientTrack solution to grow and scale to match.

The following design tools enable robust configuration and tailoring of the solution:

» **Query Designer.** ClientTrack Query Designer provides authorized users with the ability to query any data from the ClientTrack database, designed for advanced users with strong understanding of relational data and familiarity with basic SQL. Query Designer lets you select data, identify advanced join parameters, perform SQL calculations and expressions, sort return results, utilize parameters, and apply simple or complex filters and sub queries.

» **Report Designer.** ClientTrack Report Designer represents a robust standalone tool for local administrators to design configured reports. Report Designer leverages Query Designer queries or stored procedures as data sources and defined additional summaries or groupings. These reports can be viewed in the system, exported to PDF for printing, or exported to Excel.

» **Chart Designer.** ClientTrack Chart Designer supports configuring charts and graphs by selecting data for display on each axis, adding defined labels, changing colors, and selecting line, area, column, bar, pie and scatter chart types in stacked or 3D mode.

» **Rules Engine.** ClientTrack Rules Engine is a comprehensive designer tool use to enforce business rules that support common processes, defining required fields, data quality checks, presenting error messages to users, and more.

» **Form Designer.** ClientTrack Form Designer enables creation of new and modification of existing forms, providing complete control over all elements and element properties, such as field placement, field type, labels, defaults, required status, and list options. Administrators can review all existing table structures,

# HMIS
## ESSENTIALS

ClientTrack®
by eccovia

*Our Eccovia team is headed by industry experts and thought leaders with many decades of collective experience in HMIS and HUD requirements, supporting Continuums of Care (CoC) running the gamut from rural, urban, and statewide/balance of state implementations.*

- » HUD and Federal Partner compliant reporting
- » Intakes and Assessments
- » Account for outcomes to funding sources
- » Conditional logic and workflows to ensure compliant data collection from start to finish
- » Real-time referrals and bed management
- » Flexible coordinated assessment tools
- » Performance measurement, tracking, and analysis
- » Powerful ad hoc reporting tools
- » Designer Toolset for creating custom forms, workflows, rules, and more, allowing your system to grow and scale without the need for custom code

create unlimited tables and columns with appropriate SQL server data types, and create entirely new normalized data structures.

- **Dashboard Designer.** ClientTrack Dashboard Designer enables creation of common dashboards for role-based user groups, and can be displayed for a selected user, client, provider, facility, etc. Dashboard elements may include any information designed by the ClientTrack Form Designer or Query Designer.
- **Workflow Designer.** ClientTrack Workflow Designer enables multi-step processes (such as a program intake, plan creation, or exit) that use business rules to direct user questions, drive required or visible steps and route the user down the right data collection path.
- **Eligibility Engine.** ClientTrack Eligibility Engine enables determining eligibility for different resources and services by creating eligibility rule sets that are simple or complex and identifying one or more path(s) to eligibility based on selection criteria and stacked and nested rules within a path.
- **Workgroup Designer.** ClientTrack Workgroup Designer defines what functions each user can access. Administrators can create new or edit existing role-based workgroups, including available menus, forms and features the users can access.

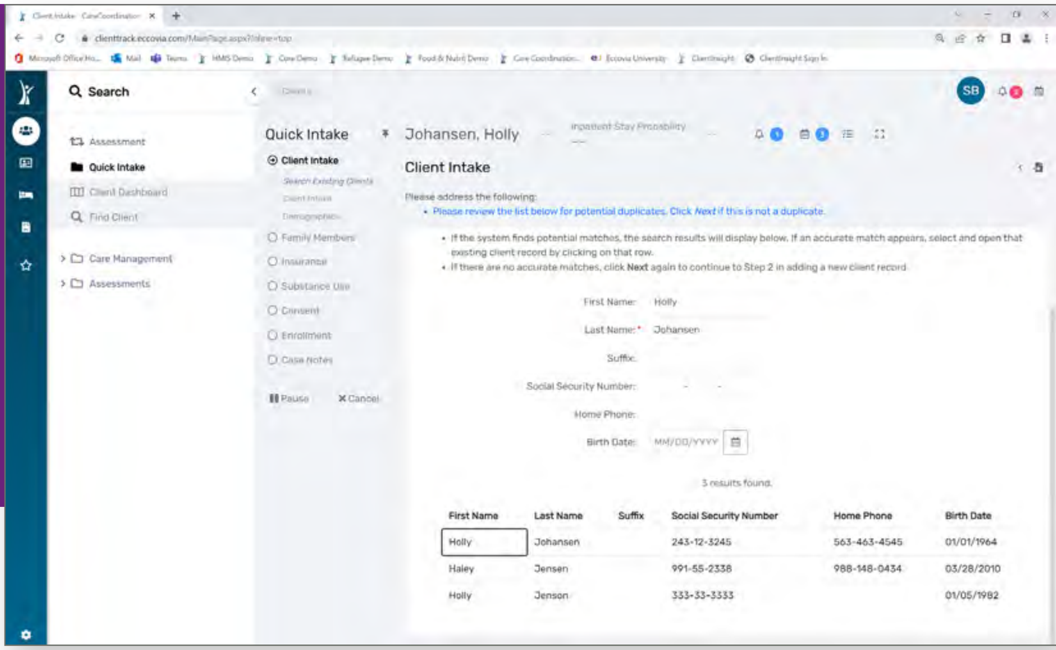
All ClientTrack environments reside withing the Microsoft Azure cloud. By hosting ClientTrack in Microsoft Azure, we protect our customer's data from security risks and prevent data loss (e.g. in the case of natural disasters). ClientTrack aligns with HIPAA, the HITECH Act, and 42 CFR Part 2 standards as part of all code development and data protection standards. This ensures complete control over ClientTrack data, including the ability to identify users and track activity performed in the system. ClientTrack's feature set ensures complete transparency and control over who has accessed data, their actions within ClientTrack, and the ability to monitor and respond to security concerns proactively.

## 2 A detailed description of any additional system specifications, capabilities and/or services that the Proposer believes may add value to the Homeless Management Information System that will be provided pursuant to the terms and conditions of the final Professional Services Agreement resulting from this RFP process.

The ClientTrack platform is a suite of products has expansion features and services which are listed below.

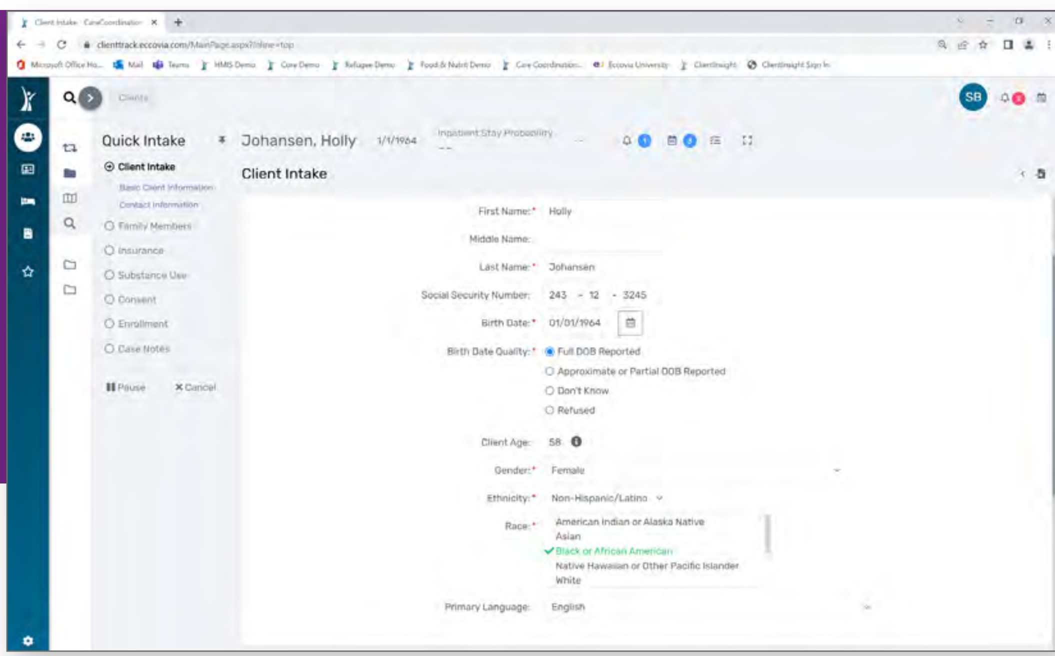
1) **ClientInsight.** Eccovia's data warehouse and business intelligence platform. ClientInsight allows partners to integrate data from multiple providers and services into a single source of truth with a single, secure point of access for reporting and analysis.
2) **Client Partner Portal.** The ClientTrack Portal enables public access to securely create, view, or update data directly in ClientTrack. The portal will be configured to align your specific needs. The portal can be used to collect data without logging in, view data about programs/services and allow users such as clients or community partners to log in and view, update, or create data on their record.
   Some common portal use cases include:
   - Requests or Applications for services can be entered and saved directly to ClientTrack from a public website
   - Clients can view their care plan and upload documents
   - Providers can view or update information on referrals or shared records.
3) **Administrator Services (Administration-as-a-Service, AaaS).** ClientTrack Administrator Services bring efficiency and turn-key ease to managing your organization so you can take care of your community. Administrator Services give Lead staff a knowledgeable partner who can help ensure continued compliance with federal partner standards, advise on effective policy, and administer day-to-day system operations.
4) **Eccovia University.** Eccovia University includes a specialized HMIS learning management system (LMS) built to host and create learning content for the needs of our unique clients. This includes onboarding, learning plans, Learning Management System (LMS), customized courses, and assessments and reporting.

# Entering a New Patient or Client Record

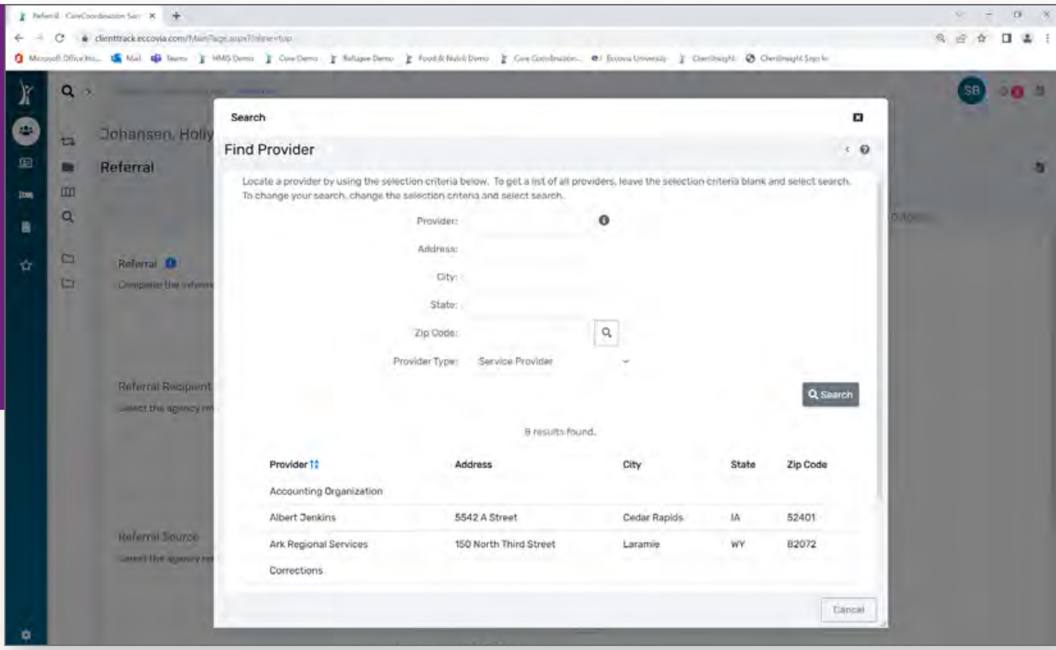



ClientTrack provides robust measures to identify and prevent duplicate client entries. The intake process includes an embedded step that checks the database for possible duplicates. The system searches for similar-sounding names that may have been spelled differently (e.g. Jon and John).

The duplicate client check may also search client aliases. Other identifying data points may be used as well, such as SSN, birth date, or other unique identifiers. In the event duplicates are created, ClientTrack provides a Client Merge tool for streamlined merging of client records.



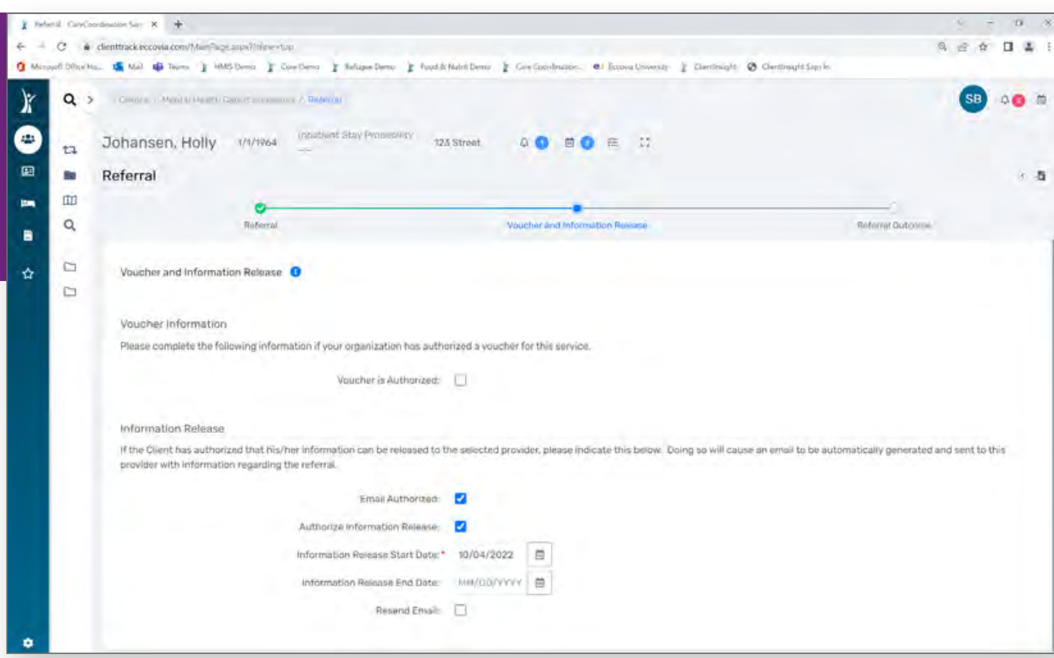
# Searching or Browsing for Organizations to Make a Referral



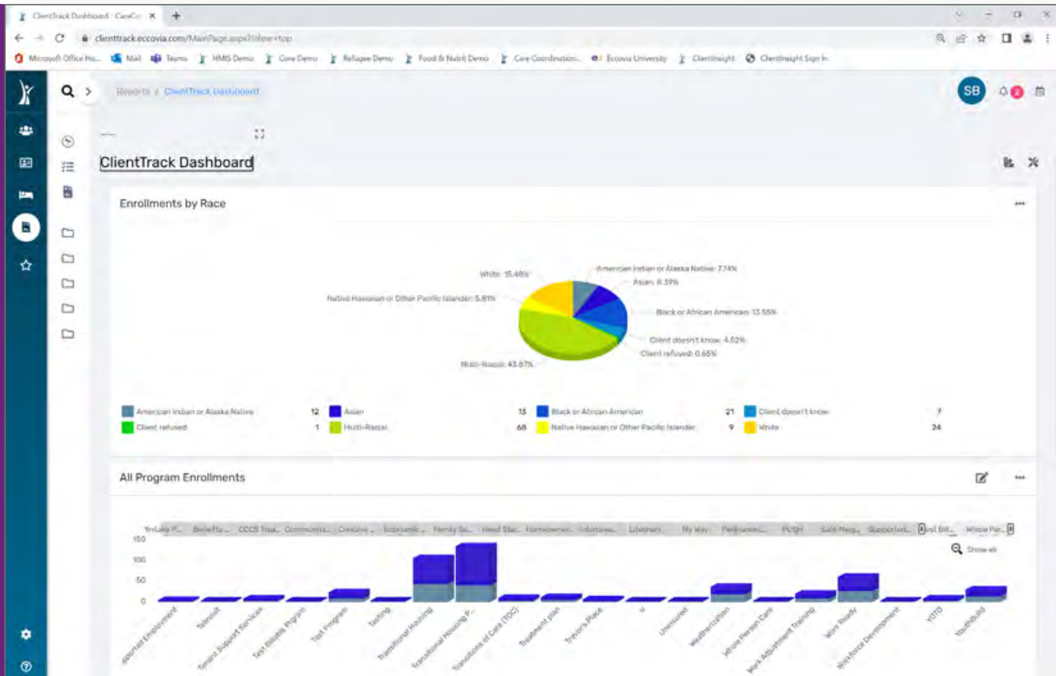

ClientTrack enables preview of historic case notes, allowing the user to select all or some notes and previewing the data. In addition, a search field can be added on the search form to search and find all notes that contain an entered word or phrase.

# Initiating or Sending a Referral

A client's referral history can be easily accessed through the Client Referral menu option or a referral component can be added to the dashboard.

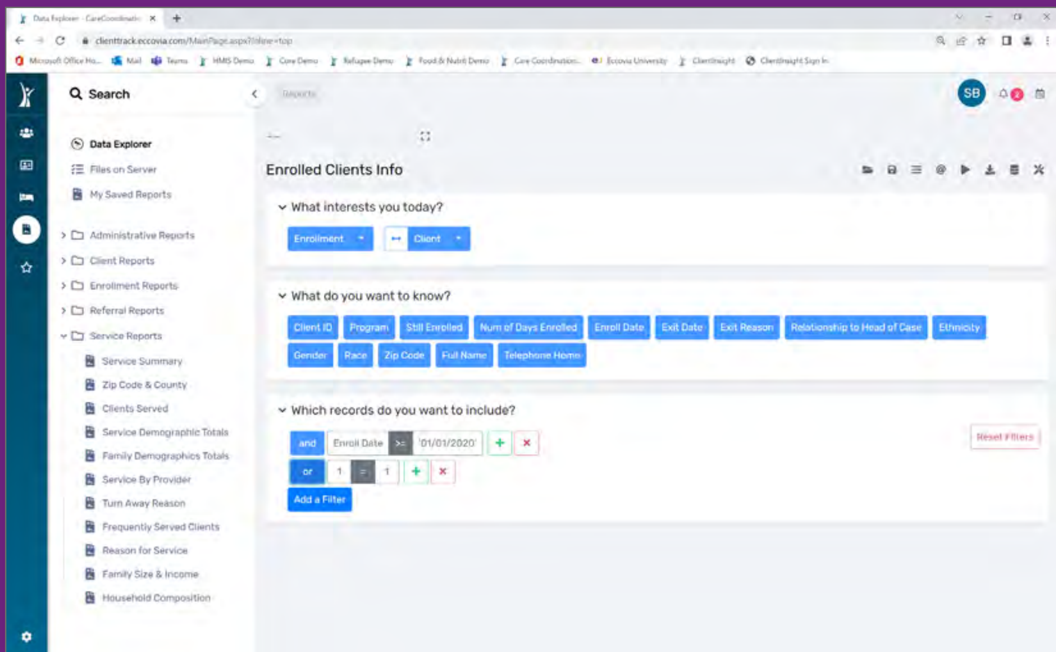


# Client Dashboards




Every client has a unique dashboard to display data from their service history. Dashboards allow for a comprehensive view of a client's record in one easy-to-understand screen.

Dashboards can include almost any data point, including enrollments, services, goals, case notes, demographic information, emergency contacts, etc. These dashboards can be customized to align with the needs of each agency.



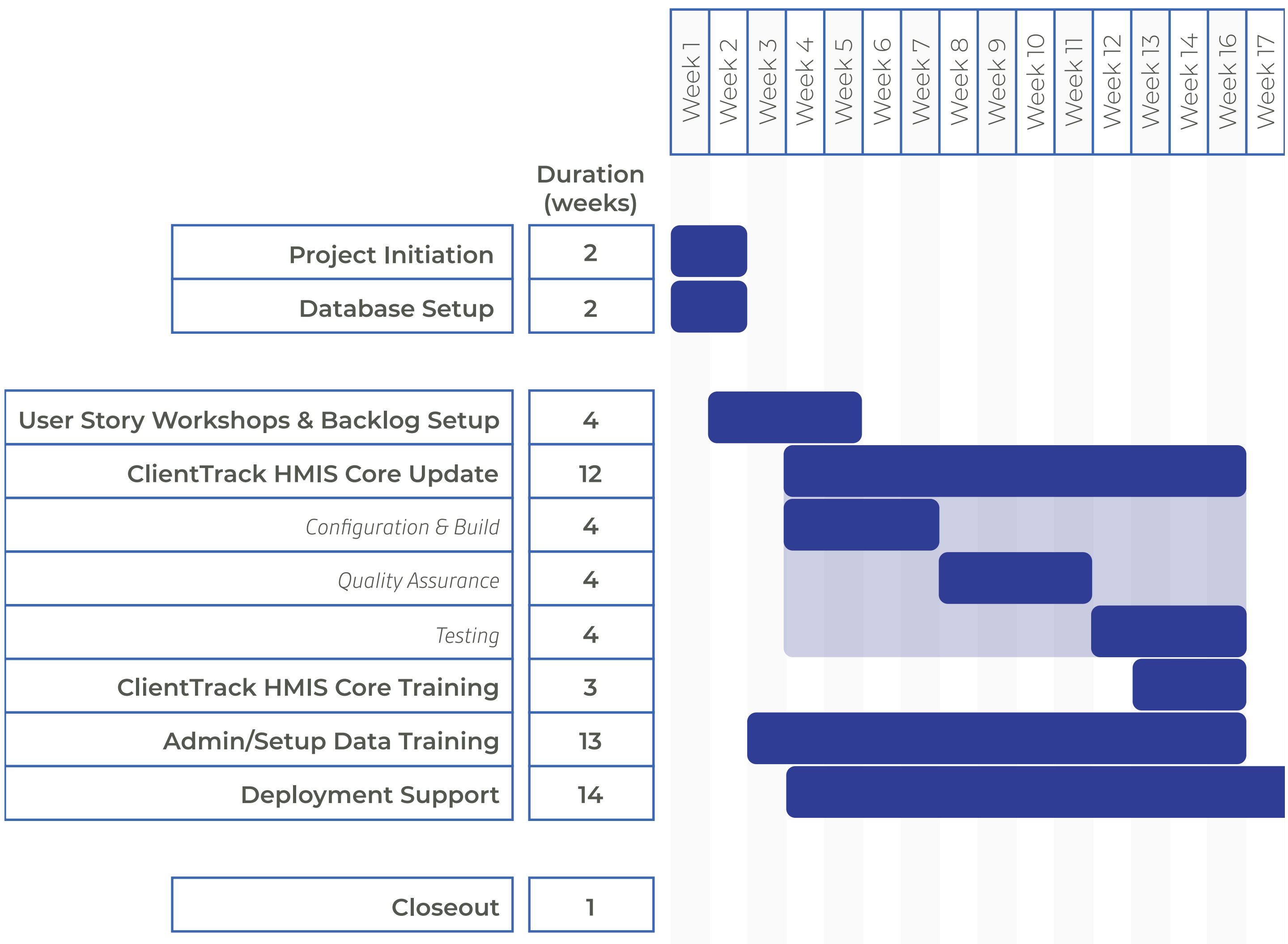
## Quality Assurance Capabilities

### 1 A detailed description of the Proposer's understanding of the requirements, challenges and potential hurdles applicable to the provision of a Homeless Management Information System with capabilities equivalent to those set forth in this RFP.

Our technology does not dictate process but supports and complements the work of frontline staff who are serving your community. The flexibility of ClientTrack will help ensure that you are able to respond quickly to emerging needs, build upon best practices, and allow you to experiment with latest trends in data tracking.

Upon award of the contract Eccovia assigns a Project Manager as the primary point of contact throughout the duration of the project implementation. The Project Manager leads the project team and coordinates resourcing and timely delivery of tasks. Project Managers are experts at managing scope and schedule, identifying and mitigating project risks, organizing and directing project resources, and communicating project status to all key stakeholders.

The Eccovia Project Manager will use the Software Delivery Lifecycle methodology and industry-standard best practices as the process for planning, creating, testing, and deploying your solution. Your dedicated Project Manager has the overall authority and responsibility for managing and executing this project according to the project plan. The Eccovia project team will represent personnel from engineering, quality assurance, configurations, cloud infrastructure, and database groups. The project manager will work with all resources to perform project planning. All project plans will be reviewed and approved by a project sponsor.



The Project Manager will manage the scope of the implementation. This includes the planning, design, development, testing, and deployment of the solution. This software will meet or exceed organizational software standards and additional requirements established in the project contract. Project completion will occur when the solution has been fully and successfully deployed to production for end user consumption.

The Project Manager will track progress against the major deliverables/milestones for the project. Status reporting will be comprised of major project milestones such as completion of a project phase or iterative development progress. There may be smaller milestones that will be reported out as needed. If there are any scheduling delays which may impact a milestone or delivery date, the project manager must be notified immediately so proactive measures may be taken to mitigate slips in dates. Any approved changes to these milestones or dates will be communicated to the project team by the project manager.

The approach for managing risks for the project includes a methodical process by which the project team identifies, scores, and ranks the various risks. Every effort will be made to proactively identify risks ahead of time to implement a mitigation strategy from the project's onset. The most likely and highest impact risks will be added to the project schedule to ensure that the assigned risk managers take the necessary steps to implement the mitigation response at the appropriate time during the schedule.

All Eccovia project managers meet weekly to discuss project risks, metrics and resource allocation. Future deliverables are considered along with existing project cadence. This information is in turn provided to Eccovia leadership, enabling resources to be scaled based on forecasted demand. The project manager will be responsible for facilitating work against project deliverables, sequencing, and estimating duration and resources with the project team. The project manager will also create the project schedule and communicate out to the project team, stakeholders, and the project sponsor.

The project team is responsible for participating in work package definition, sequencing, duration, and resource estimating. The project team will also review and validate the proposed schedule and perform assigned activities once the schedule is approved.

## 2 A detailed description of the processes that will be utilized to ensure that a Homeless Management Information System with capabilities equivalent to those set forth in this RFP.

With an extensive history of supporting health and human service organizations, Eccovia recognizes that being HIPAA compliant is necessary, but compliance alone is not sufficient. Privacy laws and regulations are constantly changing, as is the risk landscape service providers operate within. To proactively meet these ever-changing needs and risks, Eccovia retains privacy and industry experts with decades of experience meeting the specific needs of domestic violence service providers. Being proactive means investing resources to stay ahead of the industry and anticipating needs. To that end, Eccovia partners with industry groups, attends and presents at conferences and learning communities, and invests in continuing education for staff.

ClientTrack aligns with HIPAA, the HITECH Act, and 42 CFR Part 2 standards as part of all code development and data protection standards. This ensures complete control over ClientTrack data, including the ability to identify users and track activity performed in the system. The security risks to victims of domestic violence cannot be overstated, and victim service providers need all the tools possible to ensure client safety. ClientTrack's feature set ensures complete transparency and control over who has accessed data, their actions within ClientTrack, and the ability to monitor and respond to security concerns proactively.

Eccovia manages access to PHI stored in the system through our Compliance Plan and Policy, which includes:

» **Data Confidentiality.** Eccovia safeguards all data as confidential.

» **Minimum Necessary Rule.** At Eccovia, protected information will be accessible only as necessary and only by authorized individuals.

» **Reasonable Care.** Anyone at Eccovia accessing protected information will use reasonable care to protect the data, including proper disposal of paper records, logging out of workstations, and keeping open paper materials stored when not at their desks, securing covered information at the end of the workday, and using computers protected by data encryption.

» **Notice and Training.** Eccovia provides annual HIPAA training for all employees, who must acknowledge in writing that they have received and understood the training.

» **Annual Review.** All Eccovia security measures will be reviewed annually or whenever a change in our business practices may impact data security.

» **Incident Reporting/Response.** All Eccovia employees are required to report any suspicious or unauthorized use of covered information immediately. Any violation of data security will be reported to Eccovia's Data Security Coordinator, who will appropriately investigate, respond, and notify all relevant parties as may be prudent or required by law.

# OUR CUSTOMERS SAY IT BEST

ClientTrack has been an invaluable tool to provide quality and effective case management for individuals with complex social and medical needs across the country. Here are just a few of our customers' experiences.

“

ClientTrack has allowed my team to be **very effective and efficient** in what they do and to see what kind of difference they are making in someone's life. **I would absolutely recommend ClientTrack** to any agency that is providing case management services or intensive case management services.

“

The overall goal of implementing ClientTrack was to **streamline processes and make things more efficient** for the case workers doing the work so they could focus more on providing services to clients. ClientTrack has also allowed us as a state agency to do **more database decision making** and **make more accurate reporting.**

“

**The ClientTrack mobile application is genius.** There isn't anything I can do on my desktop that I can't do on my iPad.

“

We rarely have a discussion, workgroup, or a meeting, or make a decision without looking at the data in ClientTrack.

“

ClientTrack offered an off-the shelf product which met most of our needs, and we were able to personalize the system to meet the rest. The modules allow for **an efficient and organized way of collecting and reviewing client data,** allowing our users to record vital information as clients progress through our program.

“

Before ClientTrack, we operated on 249 different spreadsheets of excel files in order to do our federal reporting. Now we are able to start looking at the data and have it tell a more fruitful story. **ClientTrack certainly has freed up an enormous about of time within my team.**

## 3 A detailed description of the expected communication channels between the Proposer and DHHS – Social Services, including, without limitation, how potential problems and/or disputes will be resolved.

A Communication Plan will be established to define the methods and frequency of communication for the project. This document will be a tool used to gain agreement between Eccovia and the County regarding the project approach and method. A strict communication cadence will ensure alignment toward the project goals and objectives. This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication needs change. This plan identifies and defines the roles of persons involved in this project. It also includes a communications matrix which maps the communication requirements of the project.

In addition, the Project Manager will communicate with each stakeholder to determine their preferred frequency and method of communication. This feedback will be maintained by the Project Manager in the project's Stakeholder Register. Standard project communications will occur in accordance with the Communication Plan; however, depending on the identified stakeholder communication requirements, individual communication is acceptable and within the constraints outlined for this project. Once all stakeholders have been identified and communication requirements are established, the project team will maintain this information in the project's Stakeholder Register and use this, along with the project communication matrix as the basis for all communications.

Our support structure begins foundationally within the platform with in-application support material for end users that leads them through the system to build proficiency. Onscreen help functionality provides end users with useful information on any form or screen helping guide them through any data entry process. This help text is easily managed by your designer administrator.  In addition, ClientTrack's integrated help system provide any user with access to documentation, shortcuts, issue submission, and other features.

The Help Center's ticketing system is designed to enable end users to submit tickets or requests to the System Administration team, and then, if needed, can be forwarded to Eccovia technical support along with the key metadata necessary for speedy resolution. The Help Center's ticketing system is designed to enable end users to submit tickets or requests to the System Administration team. If needed, submitted tickets can then be forwarded to Eccovia technical support when a system issue is confirmed. Tickets are submitted by selecting "Help" on the form in which the error is occurring; this will include metadata in the ticket about the page or form to aid in resolution.

Another key set of support is virtually invisible to Eccovia customers but critical for their success in delivering services to their constituents. Eccovia's robust cloud-based infrastructure features rich monitoring of IT resources and services. Eccovia seeks to identify issues before they occur. This predictive analysis of Eccovia's cloud infrastructure allows proactive responses to potential problems, minimizing the impact to customers.

Post-implementation our solution enables clients to report potential bugs from within the software itself using a ticketing system. Tickets allow for bidirectional communication between the Support or development teams and clients. Tickets can be initiated via phone with our Eccovia's Support team through the in-app ticketing system. ClientTrack offers in-application support material for end users that leads them through the system to build proficiency. Onscreen help functionality provides end users with useful information on any form or screen helping guide them through any data entry process. This help text is easily managed by your system administrator.

# Cost Proposal

## Price Quotes

## General Instructions and Requirements

Please see attached pricing proposal.

PLEASE SEE ATTACHED PRICING PROPOSAL

**REQUEST FOR PROPOSALS NO. DHHS2023-03**
**HOMELESS MANAGEMENT INFORMATION SYSTEM**
**ATTACHMENT B – COST PROPOSAL FORM**
**(Submit with Proposal)**

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** | |
| **Title:**<br>**Salary Calculation:**<br>**Duties Description:** | $0.00 |
| **Title:**<br>**Salary Calculation:**<br>**Duties Description:** | $0.00 |
| **Title:**<br>**Salary Calculation:**<br>**Duties Description:** | $0.00 |
| **Total Personnel Costs:** | **$0.00** |
| **B. Operational Costs** | |
| **Item:**<br>**Description:** | $0.00 |
| **Item:**<br>**Description:** | $0.00 |
| **Item:**<br>**Description:** | $0.00 |
| **Total Operational Costs:** | **$0.00** |
| **C. Consumables/Supplies** | |
| **Item:**<br>**Description:** | $0.00 |
| **Title:**<br>**Description:** | $0.00 |
| **Title:**<br>**Description:** | $0.00 |
| **Total Consumable/Supplies:** | **$0.00** |
| **D. Transportation/Travel** | |
| **Title:**<br>**Description:** | $0.00 |
| **Total Transportation/Travel:** | **$0.00** |
| **E. Other Costs** | |
| **Title:**<br>**Description:** | $0.00 |
| **Total Other Costs:** | **$0.00** |
| **F. Indirect Costs** | |
| **Title:**<br>**Description:** | $0.00 |
| **Total Other Costs:** | **$0.00** |
| **Total:** | **$0.00** |

## Pricing Estimate - Humboldt County

| Software Licenses / Fees | Qty | Rate | Year 1 | Year 2 | Year 3 |
|---|---|---|---|---|---|
| **ClientTrack HMIS** | | | | | |
| ClientTrack Essentials Software License | 1 | $ 37,950.00 | $ 37,950.00 | | |
| Concurrent User Access Licenses (monthly) | 25 | $ 115.00 | Included | $ 34,500.00 | $ 35,880.00 |
| Advanced Analytics License | 1 | $ 12,000.00 | $ 12,000.00 | $ 12,000.00 | $ 12,480.00 |
| **One-Time Implementation Fees and Ongoing Services** | | | | | |
| Project Initiation, Planning and Design | 1 | $ 6,840.00 | $ 6,840.00 | | |
| Data Migration - HMIS CSV Data | 1 | $ 12,000.00 | $ 12,000.00 | | |
| Data Migration - Non HMIS CSV Data Elements | | TBD | TBD | | |
| Project Build | 1 | $ 7,680.00 | $ 7,680.00 | | |
| Deployment Support/Transition | 1 | $ 5,370.00 | $ 5,370.00 | | |
| Project Training (Train-the-Trainer) | 1 | $ 4,500.00 | $ 4,500.00 | | |
| Designer Toolset Access (includes Training and Certification) for up to 2 designees. | 1 | $ 8,000.00 | $ 8,000.00 | $ 8,000.00 | $ 8,000.00 |
| | | **Annual Total** | **$ 94,340.00** | **$ 54,500.00** | **$ 56,360.00** |

# Supplemental Documentation

## Provision of a Homeless Management Information System

### 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.

ClientTrack is a highly configurable platform with advanced features that will be accessible by trained administrators. ClientTrack's Designer toolset, which provides the flexibility to edit existing or create custom fields, forms, workflows, reports, and security models (including role-based access levels and organization/division sharing rules) that follow business rules and processes, also allows for future extensibility managed locally. ClientTrack Workflow Designer enables multi-step processes (such as a program intake, plan creation, or exit) that use business rules to direct user questions, drive required or visible steps, and route the user down the right data collection path.

With our platform, referrals can be managed from one screen. Referrals can also be collected from other views, including client, provider, and organizational referrals. Individual agencies can quickly enter client information, share that data in real-time, communicate with other agencies, and provide eligibility-based referrals. Once a referral has been made, users can close the loop and record a referral outcome.

Additionally, ClientTrack's HMIS CSV export tool is continually updated to align with HUD's current specifications. ClientTrack currently supports the HMIS CSV Format FY 2022. The new FY 2024 specifications will be adopted in alignment with the October 2023 data standards update.

### 2 A user interface that is easy to navigate and provides consistent page views on a variety of devices, including, without limitation, mobile applications.

ClientTrack is a web application that can be used securely on any device, including personal computers, laptops, smartphones, and tablets. ClientTrack's responsive design ensures that the interface is optimized to compensate for a smaller screen, which means that users of mobile devices remain fully functional when they are accessing the system through any web browser.

### 3 Capacity for document generation, including, without limitation, readable, printable blank forms and completed forms.

ClientTrack's users have the option of printing most forms within our platform. The platform also supports a wide range of export formats. Reports can be exported to PDF and CSV files, and forms can be exported to a CSV, Excel file, or printed directly from the platform.

### 4 Secure upload storage for a variety of different documents, including, without limitation, consent forms, verifications, rental agreements and stabilization plans.

Files can be uploaded and associated with a client's file in almost any format, including PDFs, JPGs, Excel, and Word documents. ClientTrack document storage secures all files within Azure Blob storage, which is designed with geo-replication and flexibility to scale as needed. Files can be downloaded for use outside the system.

### 5 Built-in measures to prevent data entry mistakes and back-end reporting to identify data entry errors and guide data cleanup.

ClientTrack utilizes logic-driven workflows to automate and streamline various processes throughout the system. These can be leveraged for activities such as intakes, assessments, reviews, etc. Workflows will guide each users through a process to intuitively collect the data required and automatically populating previously collected data when appropriate. By leveraging logic-driven, step-by-step data collection, ClientTrack provides improved data accuracy and completeness.

### 6 Software with case management tools for recording various different data types, including, without limitation, case notes, follow-up instructions and queries on no contact within a certain number of days.

The system's intuitive interface empowers all users to easily perform their day-to-day activities. This flexibility ensures that users have everything they need, allowing for seamless transitions between case manager assignments, client case notes, goal plans, and other functions and features as determined by the system administrator. At the same time, the broad range of support features dedicated to supervisors encourages improved communication and oversight of work, from the individual case worker to the entire organization.

Case managers can be assigned during the intake process. Reminders and tasks can be created to support follow-up activities, and every case manager can have an assigned supervisor that can view case manager-specific information on both forms and reports to support supervisors in outcome reporting.

### 7 Matching functionality and deduplication measures to identify and prevent duplicate client entries across agencies.

Our platform provides robust deduplication measures to identify and prevent duplicate client entries. The intake process includes an embedded step that checks the database for possible duplicates. The system searches for similar sounding names that may have been spelled differently (e.g. Jon and John). The duplicate client check may also search client aliases. Other identifying data points may be used, such as SSN, birth date or other unique identifiers.

### 8 Functionality to support the batch import and export of data from agencies who enter program data into a separate system.

Eccovia offers several options for third party systems to use for interoperability: ClientTrack API, REST API, SFTP and batch data exchanges. The Integration Platform features a message bus and microservices to orchestrate workflows for various integration scenarios. The ClientTrack API is built with ASP.NET while the other integration options are built with serverless functions. Flat file imports and exports (such as CSV and XML) are supported through ClientTrack's existing Import/Export feature, allowing one-time setup/mapping of the requirements and enabling in-system access to import or export the applicable files. ClientTrack's open APIs and enterprise integration engine help our clients integrate with organizations or data sources across a community.

### 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.

ClientTrack's coordinated entry functionality is part of the platform and operate natively within the system. This functionality is meant to be the foundation of your coordinated entry solution, providing the HUD compliant data elements in an efficient framework using additional valuable tools including eligibility, in-system referral tracking, by name list features and more that can align with your local process.

ClientTrack aligns with HUD compliance for all coordinated entry assessment (crisis and housing needs) and event tracking and related coordinated entry APR reporting, with the added benefit of flexible design tool set to align with your local needs. Form and Workflow designer provide the flexibility to align assessments with your local selected or defined assessment, using logic based on your business rules to drive accurate, complete data collection. Eligibility rules may be used to ensure the right events/referrals are provided to connect the client with the right projects/services. In-system referral management ensures organization users can access and update referrals in real time, tracking outcomes and providing improved coordinated care, including alignment with facility availability.

ClientTrack's By Name List allows users to define which data elements they would like to filter by, as well as which elements should be considered for prioritization (i.e. VI-SPDAT Score, Months homeless, Veteran status, etc.). This allows users to create a customized prioritization solution that best fits their needs. ClientTrack can support simple, HUD compliant coordinated entry solution and tailored solution meeting local business rules and logic to best align with your community needs.

**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 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.**

ClientTrack provides various auditing options within the system, natively tracking table level auditing for user creation with date/time and last update. Specific data sets, such as Names, Addresses, etc. automatically track every change. Additional services are available up to and including Change Data Capture (CDC) for complete change tracking. For auditing purposes, ClientTrack registers the following information any time a record is viewed or updated: Record, Username, Date, Time, and What Happened. ClientTrack records audit records for every attempted or successful log in, recording each record created and last updated including date and time and user. Audit logging options range up to full change data capture (CDC) depending on audit requirements. Eccovia ensures audit trail information is stored in a secure location and is backed up regularly.

The platform is designed to track consent and segment and partition data by user, program, organization, and other data types. Multi-layered security protects your data in Azure across physical datacenters, infrastructure, and operations in Azure, with state-of-the-art security controls integrated into the hardware and firmware components, as well as added protections against threats such as distributed denial of service (DDoS).

ClientTrack includes Disaster case management components created in alignment with Federal Emergency Management Agency (FEMA). System setup enables local administrators to enable new programs and services to be set up and immediately tracked as needed. Eligibility rules are often used to validate the address of the client meets specified location(s) for the disaster funding allocated to enroll appropriate clients when services are limited to the designated disaster area.

Eccovia maintains a detailed disaster response plan to minimize downtime in cases of data corruption, security breach, or natural disaster. Multi-layered security protects your data in Azure across physical datacenters, infrastructure, and operations, with state-of-the-art security controls integrated into the hardware and firmware components, as well as added protections against threats such as distributed denial of service (DDoS). Eccovia works to ensure your data remains secure and available by leveraging Microsoft Azure Site Recovery to back up all production resources daily. Azure Managed SQL Backups are also utilized to automate full and transactional backups of the database environments to maximize data recoverability.

Eccovia's Disaster Recovery plan is reviewed on an annual basis to outline the measures for preventing, detecting, and recovering from disasters. The plan includes systems and critical services, including teams' roles and responsibilities, various scenarios (like data corruption, breach, outages, etc.), as well as regular testing and updates to the plan.

**11 Functionality to ensure adequate reporting in accordance with any and all applicable local, state and federal laws regulations, policies, procedures and standards.**

ClientTrack meets the reporting specifications for all vendor-specified HUD reporting specifications in alignment with the HMIS Reporting Terminology Glossary and each report specification, and is committed to maintaining compliance. HMIS Reports include Annual Performance Report (APR), Consolidated Annual Performance and Evaluation Report (CAPER), System Performance Measures (SPMs), Longitudinal Statistical Analysis (LSA), Runaway Homeless Youth (RHY) CSV Export, Supportive Services for Veteran Families (SSVF) CSV Export, the Data Quality Framework, and SAMHSA's PATH Annual Report.

Data Explorer is ClientTrack's real-time ad hoc reporting tool, specifically designed for end-user data query activities. Data Explorer enables users to generate reports at all data levels, including client, program, agency, and system levels. ClientTrack security and data sharing rules will ensure users only have access to the data they're authorized to see. In addition, ClientTrack's Query Designer tool will give admin-level users the ability to create more technical and complex queries on all data (all tables/fields) within the system

In addition to the specified file, ClientTrack includes an enhanced ability to quickly drill into the data to identify and address data quality issues.

Administrators will have direct access to manage current users and review past-active user licenses using pre-built reports that can filter by date range and many other user-related data points. Users will automatically be made inactive after a period of administrator-defined inactivity, and an administrator can inactivate or reactivate a user at any point.

## Provision of Technical Support, Training and Customer Services

### 1 Providing technical documentation, including, without limitation, user manuals and online assistance, relevant to introductory training as well as ongoing support, regarding reporting module guidance, database design and navigation, workflow for entering client information and other aspects of Homeless Management Information System data entry.

Eccovia's Learning and Development team provides training experiences to give users the role-specific skills they need to be successful in the adoption of ClientTrack. Administrator Training is conducted by our training staff and focuses on providing instructional demonstrations and guided exercises using our customized training environment. Training is provided as webinar training with corresponding documentation. This educates administrators on a variety of topics, including general ClientTrack navigation and concepts, setup data (programs, services, grants, users, etc.), and security settings to provide the system administrator with a clear understanding of the flexibility and security of the ClientTrack solution.

### 2 Providing "Train the Trainer" modules related to implementation of the Homeless Management Information System and standard ongoing training.

Eccovia's standard approach is to provide train-the-trainer training, we will prepare your designated in-house trainers to provide training and support to their peers.

Eccovia's Learning and Development team will provide learning experiences tailored to meet the needs of the County. Our instructional designers work with your staff to drive a proven process for assessing the learning needs of both users and system administrators. Beyond the trainings that will occur throughout the implementation and prior to "go-live," Eccovia's Learning and Development team provides training experiences to give users the role-specific skills they need to be successful in the adoption of ClientTrack.

Our proposed solution includes the following training activities:

» End User Training (train-the-trainer)

» Administrator Training (technical training on day-to-day admin activities)

» Designer Toolset Training (technical training on configuration and tailoring of ClientTrack)

### 3 Providing online customer support that allows for straightforward issue reporting and bug tracking.

All clients are assigned a Client Success Manager who will be your single point of contact within our company. During the initiation of the project, your Project Manager will introduce you to your assigned Client Success Manager. Your Client Success Manager will be your central point of contact for all activities after the solution is live. The Client Success Manager will lead discussions around contract renewals, licensing changes, support escalations, and requests for additional features and functionality, and will pull in other teams and departments as needed.

Your Client Success Manager is your voice and makes sure your organization's needs are met. By providing you with a dedicated Client Success Manager, we are able to learn more about your organization so we can be proactive and ensure our software continues to meet your expectations.

A final deliverable of every project is Deployment Support. This deliverable includes a pre-defined number of hours of support during the week of deployment (go-live) for daily use of the solution. A project closeout checklist will be reviewed with the County's team and updated accordingly for final approval.

Post-implementation our solution enables clients to report potential bugs from within the software itself using a ticketing system. Tickets allow for bidirectional communication between the Support or development teams and clients. Tickets can be initiated via phone with our Eccovia's Support team through the in-app ticketing system. ClientTrack offers in-application support material for end users that leads them through the system to build proficiency. Onscreen help functionality provides end users with useful information on any form or screen helping guide them through any data entry process. This help text is easily managed by your system administrator.

Over the past several years, the uptime percentage of ClientTrack has exceeded 99.9%. In the event of any downtime, a resolution is typically reached within minutes. System Status is accessible directly in the system, and includes the option to subscribe to notifications, sending an email for any maintenance windows and system updates.

## 4 Developing and implementing quality assurance protocols that are designed to ensure that the timing, description and communication related to every upgrade, release, enhancement or other change to the Homeless Management Information System are coordinated in an efficient manner.

Eccovia's implementation process features ongoing quality assurance controls. Our process provides the County with opportunities to regularly validate progress and adherence to requirements. Eccovia will provide quality assurance testing of the solution functionality to ensure that the requirements have been met by the build based on the approved user stories. Iterative functional releases will be coordinated as part of the project plan to support ongoing release and testing of components on an agreed-upon, timely schedule. Upon passing Quality Assurance Testing, Eccovia will release functionality to the County for initial User Acceptance Testing and the initiation of Data Migration and Integration activities.

Eccovia's internal quality assurance process seeks to identify bugs in the software platforms as part of their regular responsibilities. Any defects found are reported no later than the next day to the development team. The defects are then triaged and queued to be addressed. Bugs reported by customers are received by the Support team. The Support team triages these bugs, conducts their due diligence to research any additional context helpful to those addressing the bugs, and then collaborates with the appropriate development team to ensure the bug is prioritized correctly and queued for development.

Our solution enables clients to report potential bugs from within the software itself using a ticketing system. Tickets allow for bidirectional communication between the Support or development teams and clients. While Eccovia's Support team is available by phone, most clients choose to use the in-app ticketing system.

All major upgrades will initially be planned and implemented into your training/testing environment to give ample time for UAT (minimum of two weeks). Once UAT is completed, the upgrade will be expanded to your production environment. Release Notes will be provided to your local System Administrator on all upgrades and patches.

ClientTrack releases system enhancements on a regular basis. Routine system updates are pushed on a regular schedule bi-monthly and require no downtime or administrator actions. All software updates and modifications are document and provided to administrators directly in the system, which can be exported or printed as needed. System updates like major upgrades or updated data standards are deployed to a test/train system for acceptance testing before deployment to production. ClientTrack users also have dedicated Client Success Managers, who maintain frequent communication with their assigned communities to ensure changes and updates are as seamless as possible.

## Project Development

Eccovia's implementation methodology is constructed to deliver an efficient and streamlined process. Our implementation procedures have been developed through of years of work and experience in the Social and Human Services arena, as well as information technology best practices. County of Humboldt will be assigned a Project Manager who will use the Software Delivery Lifecycle methodology and industry best practices as the process for planning, creating, testing, and deploying your solution. Your dedicated Project Manager has the overall authority and responsibility for managing and executing this project according to the project plan. The County of Humboldt project team will consist of Eccovia personnel from engineering, quality assurance, configurations, cloud infrastructure, and database groups. The project manager will coordinate all resources to manage the planning, design, development, testing, end-user training and deployment of the solution.

A Communication Management Plan will be established to define the methods and frequency of communication for the project. This document will be a tool used to represent the agreement between Eccovia and County of Humboldt regarding the project approach and method. A strict communication cadence will ensure alignment toward the project goals and objectives. It will serve as a guide for communications throughout the life of the project and will be updated as communication needs change. This plan will also identify and define the roles of persons involved in this project.

Upon award, Eccovia will lead User Story Workshops where epics and user stories associated with the deliverable are identified, facilitating the setup of the project's backlog. User stories will be prioritized from both client and technical value perspectives. Initial backlog refinement will include the discussion of the details for highest priority stories. These stories will be queued up for the initial development sprints with the highest priority stories getting assigned to the sprint. Project epics will be broken down into multiple stories which will be completed each sprint. Throughout this process, two-week sprint cycles will be conducted to continuously deliver the solution deliverables and requirements.

Throughout a deliverable's timeline, the backlog will be continually refined with the highest priority stories being placed at the top, and the necessary conversations between stakeholders and the development team taking place to provide clarity to development teams. Stories discovered throughout the development process will be added to the backlog. Sprints will select stories from the top of the backlog. User stories that are identified and classified as not being included in the final Scope of Work may be set aside and addressed later, or alternatively the change control process can be initiated by the Project Manager to include selected changes in the solution. The change control process includes documentation of changes from the original scope that are agreed to by both the County of Humboldt and Eccovia. Prioritization will be utilized to identify any changes to the project schedule and provide updates as part of the Finalized Project Plan.

During implementation, the Client Onboarding team will stand up a training environment and provide access. The solution is thoroughly tested through Eccovia's Quality Assurance and User Acceptance Testing (UAT) processes. The activities defined above are managed and communicated through the Project Manager. The project will be organized into bodies of work that match key contract deliverables. These bodies of work are defined as epics. The units of work included in each epic are linked to user stories. User stories depict the various roles, workflows, principles and needs of the State to ensure Eccovia's solution is configured correctly and efficiently supports the County of Humboldt's processes.

The epics will be established as the framework for project delivery and shown during the project kick-off call. This framework will be included with the project control documents provided to all project stakeholders.

Upon completion of the QA activities, the solution will be released for optional User Acceptance Testing. During UAT, a dedicated user group consisting of subject matter experts and end users will validate the solution against the approved requirements.

The implementation project plan is an integral component of the onboarding process. Eccovia uses an agile Software Delivery Lifecycle methodology during solution implementations ensuring proper goals, plans, tasks, deliverables, milestones, timelines, expectations, and resource allocations are set for the duration of a project. Your Eccovia Project Manager will develop this Project Plan and its Subsidiary Management Plans specific to the County of Humboldt's requirements and based on best practices and lessons learned.

We are a software company who creates solutions for organizations that serve their communities. We provide a holistic solution that other vendors cannot.

# ECCOVIA'S GEOGRAPHIC REACH

ClientTrack™ by eccovia

## Mandatory Qualifications

**1 Proposers must have two (2) or more years of experience providing Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP to other public entities.**

The ClientTrack case-management platform began serving social service agencies in 1996. In 2002 we evolved into a web based, HMIS platform that meets the HUD standards for data collection, privacy, and security. For over two decades Eccovia has driven innovation in technology supporting the vulnerable people in our communities with our HMIS, ClientTrack. Today, Eccovia stands as a leader in the Case Management Information Systems SaaS industry serving over 1300 health and human services organizations in 33 states, Washington DC, Puerto Rico, and the Virgin Islands.

**2 Proposers must have extensive knowledge of, and the ability to comply with any and all local, state and federal laws, regulations, policies, procedures and standards applicable to the provision of Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP, including, without limitation, any and all applicable confidentiality, security and privacy requirements set forth in the California Confidentiality of Medical Information Act, the United States Health Information Technology for Economic and Clinical Health Act and the United States Health Insurance Portability and Accountability Act of 1996 and any and all applicable data collection, management and reporting requirements established by the United States Department of Housing and Urban Development, all as may be amended from time to time.**

ClientTrack meets or exceeds HIPAA technical standards. With over 20 years in the software industry, Eccovia has broad experience building software solutions that are subject to compliance frameworks, such as HIPAA and 42 CFR Part 2. Our Privacy and Security Officer oversees all ongoing activities related to the development, implementation, and maintenance of our privacy policies in accordance with applicable federal and state laws. In addition, our ongoing security awareness and training program provides mandatory annual HIPAA training for all Eccovia employees.

In regards to 45 CFR Parts 160, 162, and 164, these regulations are specific to health plans, health care clearinghouses, and health care providers. As an HMIS, ClientTrack provides the security features that align with human and social services requirements and exceed health information systems.

Eccovia manages access to PHI stored in the system through our Compliance Plan and Policy, which includes:

» Data Confidentiality. Eccovia safeguards all data as confidential.

» Minimum Necessary Rule. At Eccovia, protected information will be accessible only as necessary and only by authorized individuals.

» Reasonable Care. Anyone at Eccovia accessing protected information will use reasonable care to protect the data, including proper disposal of paper records, logging out of workstations, and keeping open paper materials stored when not at their desks, securing covered information at the end of the workday, and using computers protected by data encryption.

» Notice and Training. Eccovia provides annual HIPAA training for all employees, who must acknowledge in writing that they have received and understood the training.

» Annual Review. All Eccovia security measures will be reviewed annually or whenever a change in our business practices may impact data security.

» Incident Reporting/Response. All Eccovia employees are required to report any suspicious or unauthorized use of covered information immediately. Any violation of data security will be reported to Eccovia's Data Security Coordinator, who will appropriately investigate, respond, and notify all relevant parties as may be prudent or required by law.

Eccovia continues to partner with agencies throughout California as they work on the initiatives for CalAim, California Data Exchange Framework, and CA Governors Plan to Address Homelessness as well as our ongoing commitment to maintain federal compliance with HUD HMIS data standards.

Within ClientTrack, many feature support equitable, coordinated, and person-centered care. Agencies can leverage service setup for procedure codes and modifiers as well as place of service tracking aligned with CalAim for enhanced case management services related to housing navigation, housing tenancy and sustaining services, respite/interim and recuperative care housing services and housing deposit services as well as leverage ICD-10 databank of diagnosis codes to support CalAim initiatives. In addition, we have engaged and supported tracking of CalAim consent data when applicable to support CalAim and data exchange initiatives. As a client-centered case management solution designed for care coordination, ClientTrack enables CalAim initiatives to be met.

ClientTrack's data access and analytics tools in correlation with integration options including batch file and Application Program Interface (API) capabilities support both CalAim and Data Exchange Framework, while further advancements to the integrations features and platform will continue to enable agencies to share data or integrate with health information exchange systems.

ClientTrack's flexible infrastructure and design toolset allows the system to tailor to changing and innovative solutions for homelessness, and can meet a broad community wide need going above and beyond HMIS compliance to support communities as the governor's plan to address homelessness is implemented across California, as well as local CoCs and agencies identify alternate solutions to help address homelessness and track meaningful data to aid in program and service improvement and outcomes tracking.

### 3 Proposers must possess, or have the ability to obtain, any and all resources necessary to provide a Homeless Management Information System with capabilities equivalent to those set forth in this RFP.

Eccovia possesses all the resources necessary to provide a Homeless Management Information System with capabilities equivalent to those set forth in this RFP.

### 4 Proposers must employ an adequate number of qualified professional staff to ensure the efficient and effective provision of a Homeless Management Information System with capabilities equivalent to those set forth herein in accordance with the terms and conditions of the final Professional Services Agreement resulting from this RFP process.

Eccovia employ's just under 100 full time employees. Our social service practitioners have decades of experience meeting a broad range of federal, state, and local compliance requirements. This experience has translated into the features in ClientTrack that make compliance management easy and intuitive and the assurance that with ClientTrack, compliance is baseline. We have a vast history ensuring compliance for our partner organizations at the federal, state, and local level.

### 5 Proposers must not have a record of unsatisfactory performance, illegal activity, lack of integrity or poor business ethics.

Eccovia does not have a record of unsatisfactory performance, illegal activity, lack of integrity or poor business ethics.

## Preferred Qualifications

### 1 The Proposer has five (5) years of experience providing Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP to other public entities.

Since 1996, Eccovia's HMIS ClientTrack, has helped faith-based, nonprofit, and public entities, provide services to those experiencing homelessness.

**2 The Proposer has the ability to start providing services pursuant to the terms and conditions of the final Professional Services Agreement resulting from this RFP process on or before April 1, 2024.**

Eccovia's primary focus is the adoption of best practices ensuring effective case management practices, compliance, and reporting. Our experience gives us the knowledge necessary to be flexible in our approach and prepares us to work through any nuances specific to your data. Upon award, a mutually agreed-upon Scope of Work will be developed. The Scope of Work will act as a framework to guide project deliverables & timelines. We will work closely with your team to ensure a successful and on-time implementation. Eccovia's has the ability to provide services pursuant to the agreed upon terms and conditions on or before April 1, 2024.

## Licensure, Certification and Accreditation Requirements

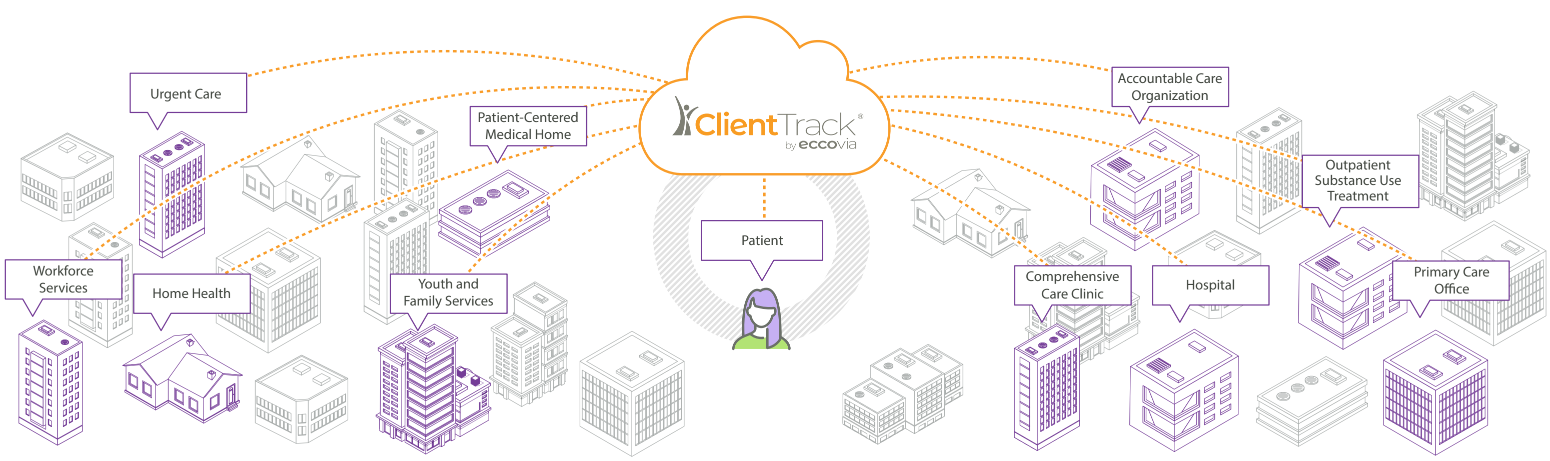
Eccovia's social service practitioners have decades of experience meeting a broad range of federal, state, and local compliance requirements. This experience has translated into the features in ClientTrack that make compliance management easy and intuitive and the assurance that with ClientTrack, compliance is baseline. We have a vast history ensuring compliance for our partner organizations at the federal, state, and local level.

## Coordinated Entry

ClientTrack is a HUD compliant coordinated entry solution, tailored to meet local business rules and logic to best align with your community needs. ClientTrack's coordinated entry functionality is part of the platform and operates natively within the system. This functionality is meant to be the foundation of your coordinated entry solution, providing the HUD compliant data elements in an efficient framework using additional valuable tools including eligibility, in-system referral tracking, by name list features and more that can align with your local process.

ClientTrack aligns with HUD compliance for all coordinated entry assessment (crisis and housing needs) and event tracking and related coordinated entry APR reporting, with the added benefit of flexible design tool set to align with your local needs. Form and Workflow designer provide the flexibility to align assessments with your local selected or defined assessment, using logic based on your business rules to drive accurate, complete data collection. Eligibility rules may be used to ensure the right events/referrals are provided to connect the client with the right projects/ services. In-system referral management ensures organization users can access and update referrals in real time, tracking outcomes and providing improved coordinated care, including alignment with facility availability.

ClientTrack provides robust measures to identify and prevent duplicate client entries. The intake process includes an embedded step that checks the database for possible duplicates. The system searches for similar sounding names that may have been spelled differently (e.g., Jon and John). ClientTrack can also use unique identifiers such as client aliases, social security number, birth date to check for duplicate entries. Our By Name List (BNL) features provide the foundation to align with your local needs for review and management of homeless or at-risk clients, including your locally defined scoring and prioritization as appropriate. In the event duplicates are identified, ClientTrack provides a Client Merge tool for streamlined merging of client records.



# References

## Using the two forms attached, provide two references from HMIS clients:

a. **Reference Data Sheet. Proposals shall include a complete and verified Reference Data Sheet, which is attached to this RFP as Attachment C – Reference Data Sheet and incorporated herein by reference as if set forth in full, that includes present and past performance information from a minimum of two (2) former clients, preferably governmental agencies, to whom the Proposer has provided Homeless Information Management Systems with capabilities equivalent to those set forth in this RFP within the past three (3) years.**

b. **Required Information. The performance information provided with each reference must be clearly correlated to the provision of Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP. Each reference must include, at a minimum, all of the following information:**

- » **The name, physical address, email address and telephone number for the current contact person of each referenced client.**
- » **The dates on which the Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP were provided to each referenced client.**
- » **A detailed description of the Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP that were provided for each referenced client, including, without limitation, the time period in which such Homeless Management Information Systems were delivered.**
- » **A detailed description of how the Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP that were provided by the Proposer led to accomplishment of each referenced client's goals and objectives.**
- » **Verification that all information provided in the Reference Data Sheet is true and correct to the best of the Proposer's knowledge.**

Please see reference data sheets for Palm Beach County Florida, Division of Human Services and The State of Georgia, Finance and Housing Authority.

## Reference Data Sheet Verification

All information provided in the Reference Data Sheets is true and correct.

**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:** | Palm Beach County Division of Human Services | |
| **STREET ADDRESS:** | 301 N. Olive Ave | |
| **CITY, STATE, ZIP:** | West Palm Beach, FL 33401 | |
| **CONTACT PERSON:** | Keianna Pierre-Louis | **EMAIL:** kpierrel@pbcgov.org |
| **PHONE #:** | 561-355-4776 | **FAX #:** |
| **Department Name:** | Homeless and Housing Alliance of Palm Beach County | |
| **Approximate County (Agency) Population:** | 1.5 Million | |
| **Number of Departments:** | 43 | |
| **General Description of Scope of Work:** | Palm Beach County is a standard HMIS Implementation which is utilized to collect client-level data on the provision of housing and services to individuals and families at risk of and experiencing homelessness. Their primary goal is to utilize the data input in HMIS to strengthen efforts to reduce and end homelessness | |
| **Applicant Tracking System Implementation Date:** | 2015 | |

**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:** | State of Georgia Department of Community Affairs | |
| **STREET ADDRESS:** | 60 Executive Park South NE | |
| **CITY, STATE, ZIP:** | Atlanta, GA 30329 | |
| **CONTACT PERSON:** | Jeanette Pollock | **EMAIL:** jeanette.pollock@dca.ga.gov |
| **PHONE #:** | 404-679-3177 | **FAX #:** |
| **Department Name:** | Georgia Department of Community Affairs HMIS | |
| **Approximate County (Agency) Population:** | State Agency- 10.8 Million | |
| **Number of Departments:** | 132 State Agencies (11 programs under Department of Community Affairs) | |
| **General Description of Scope of Work:** | The Georgia Homeless Management Information Systems (HMIS) is intended to provide a community with an unduplicated count of its homeless population. HUD requires each Continuum of Care to implement an HMIS System to report jurisdictional data, and to contribute data to the upcoming Annual Homeless Assessment Report | |
| **Applicant Tracking System Implementation Date:** | 2016 | |

# Evidence of Insurability and Business Licensure

## Submit evidence of eligibility for all insurances required by the sample Professional Services Agreement that is attached hereto as Attachment D

Please see attached.

ACORD®

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 8/15/2023

**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**
Arthur J. Gallagher Risk Management Services, LLC
6967 South River Gate Dr.
Suite 200
Salt Lake City UT 84047

**CONTACT NAME:** Holly Rencher
**PHONE (A/C, No, Ext):** 801-924-1400 **FAX (A/C, No):** 801-924-1441
**E-MAIL ADDRESS:** certrequests@ajg.com

| INSURER(S) AFFORDING COVERAGE | NAIC # |
|---|---|
| INSURER A : Twin City Fire Insurance Company | 29459 |
| INSURER B : Hartford Accident and Indemnity Company | 22357 |
| INSURER C : Houston Casualty Company | 42374 |
| INSURER D : | |
| INSURER E : | |
| INSURER F : | |

**INSURED** ECCOINC-01
EccoVia, Inc
2150 W. Parkway Blvd, Suite A-101
Salt Lake City UT 84119

**COVERAGES** **CERTIFICATE NUMBER:** 1880693886 **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.

| INSR LTR | TYPE OF INSURANCE | ADDL INSD | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS | |
|---|---|---|---|---|---|---|---|---|
| A | X COMMERCIAL GENERAL LIABILITY | | | 34SBAIK0334 | 6/21/2023 | 6/21/2024 | EACH OCCURRENCE | $ 1,000,000 |
| | CLAIMS-MADE X OCCUR | | | | | | DAMAGE TO RENTED PREMISES (Ea occurrence) | $ 1,000,000 |
| | | | | | | | MED EXP (Any one person) | $ 10,000 |
| | | | | | | | PERSONAL & ADV INJURY | $ 1,000,000 |
| | GEN'L AGGREGATE LIMIT APPLIES PER: | | | | | | GENERAL AGGREGATE | $ 2,000,000 |
| | POLICY PRO-JECT LOC | | | | | | PRODUCTS - COMP/OP AGG | $ 2,000,000 |
| | OTHER: | | | | | | | $ |
| A | AUTOMOBILE LIABILITY | | | 34SBAIK0334 | 6/21/2023 | 6/21/2024 | COMBINED SINGLE LIMIT (Ea accident) | $ 1,000,000 |
| | ANY AUTO | | | | | | BODILY INJURY (Per person) | $ |
| | OWNED AUTOS ONLY; SCHEDULED AUTOS | | | | | | BODILY INJURY (Per accident) | $ |
| | X HIRED AUTOS ONLY; X NON-OWNED AUTOS ONLY | | | | | | PROPERTY DAMAGE (Per accident) | $ |
| | | | | | | | | $ |
| A | X UMBRELLA LIAB; X OCCUR | | | 34SBAIK0334 | 6/21/2023 | 6/21/2024 | EACH OCCURRENCE | $ 5,000,000 |
| | EXCESS LIAB; CLAIMS-MADE | | | | | | AGGREGATE | $ 5,000,000 |
| | DED X RETENTION $ 10,000 | | | | | | | $ |
| B | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y / N | | | 34WECCD5935 | 2/1/2023 | 2/1/2024 | X PER STATUTE; OTH-ER | |
| | ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) | N / A | | | | | E.L. EACH ACCIDENT | $ 1,000,000 |
| | If yes, describe under DESCRIPTION OF OPERATIONS below | | | | | | E.L. DISEASE - EA EMPLOYEE | $ 1,000,000 |
| | | | | | | | E.L. DISEASE - POLICY LIMIT | $ 1,000,000 |
| C<br>C | Cyber Liability<br>Professional Liability | | | H23TG31136-02<br>H23TG31136-02 | 6/21/2023<br>6/21/2023 | 6/21/2024<br>6/21/2024 | Each Wrongful Act | $5,000,000 |

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**
Verification of insurance subject to the terms and conditions of the policy.
Cyber Liability includes coverage for "Data Privacy and Network Security Liability", "Media Liability", and "Professional Liability"

**CERTIFICATE HOLDER**

**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**





THIS CERTIFICATE SUPERSEDES PREVIOUSLY ISSUED CERTIFICATE

# Exceptions, Objections and Requested Changes

## Any exceptions, objections or requested changes to any portion of this RFP, and/or the sample Professional Services Agreement attached hereto, shall be clearly identified and explained in the Proposal.

If selected Eccovia would like to discuss the following terms and conditions for further clarification:

- 2-L Notification of Possible Breach
- 8-A Record Retention and Inspection
- 10.4-C Termination without Cause

REAL SOLUTIONS • REAL PERSON IMPACT

Address:
Eccovia, Inc.
2150 W. Parkway Blvd, Suite A-101
Salt Lake City, UT 84119

Online:
eccovia.com