

**ARLINGTON COUNTY, VIRGINIA  
OFFICE OF THE PURCHASING AGENT**

**INVITATION TO BID NO. 22-DHS-RFP-301**

**ADDENDUM NO. 1**

Arlington County (hereinafter referred to as the “County”) Request for Proposals (RFP) No. 24-DES- RFP-301 for a Cloud Based Commercial Off the Shelf (COTS) and Highly Configurable Customer Service and Case Management System (CSMS and a Homeless Management Information System (HMIS) )is amended as follows:

- **THE SUMMARY OF THE NON-MANDATORY PREPROPOSAL CONFERENCE HELD ON FEBRUARY 22, 2024 IS AS FOLLOWS:**

During the optional Preproposal Conference, the County reviewed the RFP and highlighted key information such as: key proposal deadlines; communication procedures (**i.e. all communication relating to the solicitation must be submitted via the “Submit a Question” function Vendor Registry; no outside communication is permissible**); proposal submission requirements. Additionally, Offerors were reminded that each Offeror must review the RFP in its entirety and ask any questions they may have.

- **THE OPTIONAL PREPROPOSAL CONFERENCE POWERPOINT AND SIGN-IN SHEETS ON THURSDAY, FEBRUARY 22, 2024 AT 11:00 A.M. ARE ATTACHED.**
- ***THE COUNTY HAS RECEIVED THE FOLLOWING QUESTIONS IN RESPONSE TO THIS RFP. QUESTIONS AND RESPONSES ARE INCLUDED BELOW.***

**QUESTION #1**

Would the County provide the answers to submitted questions on a rolling basis or all at once?

**ANSWER #1**

The County will issue an addendum with all questions that were submitted via Vendor Registry collectively via an addendum.

**QUESTION #2**

Can the County please provide a list of the programs and services that are supported by CSMS and HMIS? Are there any programs that are managed outside CSMS and HMIS? If yes, what system is used to manage those programs?

**ANSWER#2**

Current CSMS is supported by Efforts to Outcomes (ETO) by Social Solutions

- Adult Services (Arlington Employment Center)
- Business Engagement Team (Arlington Employment Center)
- Youth Program (Arlington Employment Center)
- Clinical Coordination Program Case Routing
- Child and Family Services - Customer Service
- Child and Family Service -Project Family
- Clinical Coordination Program (Community Assistance Bureau)
- Community Outreach Program (Community Assistance Bureau)
- Customer Service Center
- Medical Case Management-Intake and Referrals
- Medical Case Management

- Green Valley Program

Current Homeless Programs is supported by **HMIS** Efforts to Outcomes (ETO) by Social Solutions

HMIS project type acronyms:

- PSH = permanent supportive housing
- RRH = rapid re-housing
- TH = transitional housing
- OPH = other permanent housing
- CE = Coordinated Entry
- ES = Emergency shelter
- Hypo = hypothermia shelter
- SO = Street Outreach

Current HMIS projects (programs):

- PathForward
  - Homeward **\*PSH\***
  - Homebound 1 **\*PSH\***
  - Turning Keys **\*PSH\***
  - Westover (In-Roads) **\*PSH\***
  - RRH **\*RRH\***
  - Housing Locator
  - Housing Trust Fund – Pathforward **\*supportive services\***
  - HSC – Hypothermia **\*hypo\***
  - HSC – Hypothermia (Non-Resident) **\*hypo\***
  - HSC – Medical Respite **\*ES\***
  - HSC – Shelter **\*ES\***
  - Opportunity Place – Arlington **\*SO\***
  - Opportunity Place – Non-Arlington **\*SO\***
  - Prevention (Local/State)
  - PSH – In Pool
  - SNOFO (RRH)
  - SNOFO (TH)
  - Triage
- New Hope Housing
  - Drop In
  - Home RRH (CHERP/HUD/State) **\*RRH\***
  - Housing Trust Fund – NHH **\*supportive services\***
  - Just Homes **\*PSH\***
  - Susans Place **\*PSH\***
  - Re-Entry Programming Unit (RPU)
  - Residential Program Center (RPC) **\*ES\***
  - RPC Hypothermia Overflow **\*hypo\***
  - NHH Triage
- Doorways
  - Cameron Commons **\*OPH\***
  - Family Home **\*ES\***
  - Home Start RRH (Local/State) **\*RRH\***
  - Housing Trust Fund – Doorways **\*supportive services\***
  - Triage
- Bridges to Independence
  - Rapid Re-Housing (HUD/Local) **\*RRH\***

- Sullivan House **\*ES\***
- Youth Development Program
- Housing Trust Fund – Bridges **\*supportive services\***
- Triage
- DHS – Clinical Coordination Program
  - Coordinated Entry (CE) **\*CE\***
  - Prevention (CHERP/Local/State)
  - Shelter Waitlist
  - Triage
- DHS
  - CoC PSH In-Pool
  - DHS PSH In-Pool
  - DHS – DBHDS **\*PSH\***
  - DHS – Permanent Supportive Housing (PSH) **\*PSH\***
  - DHS – PSH Non-Homeless **\*PSH\***
  - DHS – MOST **\*SO\***
  - DHS – Treatment on Wheels (TOW) **\*SO\***
  - DHS – Independence House **\*TH\***
  - PIT Unsheltered

b.) Yes, there are programs managed outside CSMS and HMIS systems.

c.) There are about 30-40 software systems supporting over one hundred DHS programs delivering services to Arlington citizens. DHS IT Application portfolio includes in house developed software, configured vendor solutions, and State provided systems.

**QUESTION #3**

Would a product/platform that does not have a concurrent user licensing model not be considered for this RFP? Please confirm if you would consider a product that has a named user license model for internal users and a concurrent user licensing model for external users coming in from a portal?

**ANSWER #3**

As specified in the posted RFP under Technical Requirement 1.13 (page 12) product should have a concurrent user licensing model. B.) Other licensing models can be considered.

**QUESTION #4**

Would external users using the portal be authenticated users with user-id/password? Also, please provide an estimate of number of external users for both systems.

**ANSWER#4**

External users will be authenticated via user id and password. Current number of HMIS external users is 80. However, this number can change in the future based on needs. Therefore, County cannot provide future estimates.

**QUESTION #5**

Has the County standardized on a cloud platform - Azure vs AWS vs GCP? Does the County have a hybrid cloud environment? Would the county prefer a solution that runs on the county's current standardized platform?

**ANSWER #5**

Yes, the County has a standardized platform. Yes, the County has a hybrid cloud environment. The County is looking for an outside hosted solution for this RFP.

**QUESTION #6**

Other than the interfaces between HMIS and CSMS, what other State or County systems do these systems interface with?

**ANSWER #6**

In addition to HMIS and CSMS interface there is an interface with the department data warehouse as stated in the requirements. See page 14. Section 4. Integration/Interface Requirements. Currently there are no other interfaces for these systems. Interfaces to other systems may be considered in the future.

**QUESTION #7**

Does the County prefer a solution which runs on a specific technology stack such as Java, .net, SQL Server, etc.? Does the county prefer a low code platform such as MS Dynamics or Salesforce?

**ANSWER #7**

The County does not have a preference on code stack. It is the responsibility of the vendor to develop and support the code as well the platform where the solution runs. Offerors should include these items in their proposal of the RFP.

**QUESTION #8**

Are there any existing applications that provide the CSMS and HMIS functionality today or is this a new requirement? If existing, what are the existing systems and is it a home-grown system or COTS system? Is there a contractor maintaining the current system, and if yes, please provide their name?

**ANSWER #8**

Yes, there are existing applications that provide CSMS and HMIS functionality. See answer to question #2.

**QUESTION #9**

Is there any other existing technology stack that needs to be taken into consideration while proposing our solution?

**ANSWER #9**

No. See answer to question #7.

**QUESTION #10**

Postproduction, does the County anticipate any after-hours support or 24X7 support for the two systems?

**ANSWER #10**

Please refer to pages 21 through 22 on the posted RFP.

**QUESTION #11**

Does the government have a preference on which application (CSMS or HMIS) should go live first or by when it desires both applications to be in production?

**ANSWER #11**

The County has no preference which application goes into production first. Anticipated go live date will be discussed during normal RFP processes.

**QUESTION #12**

Apart from the bidirectional (import and export) batch transfer of client and program enrollment data from and to DHS Data Warehouse, HMIS and CSMS which will run as nightly batch processes, is there any real time bidirectional integration or interface needed between CSMS and HMIS? If yes, please elaborate.

**ANSWER #12**

Please refer to page 14 Integration/Interface Requirements of this RFP.

**QUESTION #13**

Do the two systems need to integrate with any other internal or external systems?

**ANSWER #13**

Please see question #6.

**QUESTION #14**

Please see question #6.

**ANSWER #14**

An offeror can submit proposals for either one or all the categories outlined in the Background/Purpose of the RFP. However, the primary vendor is responsible for the entire proposed solution.

**QUESTION #15**

Section IV. SCOPE OF SERVICES: 1.13 Concurrent users – The Contractor should have a concurrent user licensing model. Would a product/platform that does not have a concurrent user licensing model not be considered for this RFP?

**ANSWER #15**

Please see answer to question #3.

**QUESTION #16**

Has the County standardized on a cloud platform-Azure vs. AWS vs.GCP? Does the County a hybrid cloud environment?

**ANSWER #16**

Please refer to question # 5

**QUESTION #17**

Other than the interfaces between HMIS and CSMS, what other State or County system do these systems interfaces with?

**ANSWER #17**

Please refer to question # 6.

**QUESTION #18**

You have mentioned 3 systems you are currently using-1) <https://amerinat.com/> 2) <https://ww.zomgranst.com/> and what is #3? Is it possible to provide with the main functionality that you use and need from each system? It will help us to provide a precise estimate.

**ANSWER #18**

There is no mention in the RFP of the systems referenced.

Please refer to The Background/Purpose of the RFP page 9.

**QUESTIONS 19 THROUGH 24 WERE BLANK IN VENDOR REGISTRY.**

**ANSWER #19**

**QUESTION #25**

We have the CSMS functional requirements pdf + HMIS functional requirements pdf

**ANSWER #25**

Please refer to the requirements as listed in attachments B, C, and E of this RFP.

**QUESTION #26**

Is there a vendor who has implemented the current HMIS system? If so can you provide the name? Are they still maintaining this system?

**ANSWER #26**

Yes. Social Solutions Global (Contract 507-12-RFP) is the current HMIS provider. Yes, the system is currently maintained.

**QUESTION #27**

Is there an incumbent vendor currently supporting the Client Services Management System? Can you provide the name? Are they still maintaining the system?

**ANSWER #27**

Please refer to question #26.

**QUESTION #28**

QUESTION IS BLANK IN VENDOR REGISTRY.

**ANSWER #28****QUESTION #29**

Which of the two options does the County prefer? 1). An unbundled option where the County owns and pays for the software licenses of the platform on which the solution runs (such as Azure, MS Dynamics, SQL Server, etc.) or 2). A bundled option where all the platform licenses are owned by the vendor and included in the vendor's pricing for the solution.

**ANSWER #29**

The offeror is at liberty to propose an unbundled, bundled, or both options.

**QUESTION #30**

If a vendor proposes a solution for both CSMS and HMIS, would the County prefer the vendor to provide one unified licensing model which will cover all product licensing needed to cover all requirements for both CSMS and HMIS (For example, the proposed solution may utilize Azure, MS Dynamics and other COTS licenses)?

**ANSWER #30**

The County prefers a unified licensing model.

**QUESTION #31**

Can the County provide a 1–2-week extension to the due date for proposals to allow for complete and thoughtful responses to the RFP?

**ANSWER #31**

The County is not currently considering an extension to the April 15<sup>th</sup> Request deadline.

**QUESTION #32**

Please provide the number of HMIS users.

**ANSWER #32**

Currently, County has approximately 110 internal users and 80 external users.

**QUESTION #33**

Will DHS continue to operate as the HMIS Lead or is the county looking for the HMIS vendor to assume the HMIS Lead responsibilities?

**ANSWER #33**

The County will continue to operate as the HMIS Lead.

**QUESTION #34**

Does data warehouse offer an open API to connect into a software, or is the expectation a regularly scheduled upload? What specific data is needed by the clients to see in their portal? Are applications publicly available to potential clients to fill out? Is there a screening process as to who gets services from the initial application?

**ANSWER #34**

Data warehouse upload and download are currently scheduled for daily overnight process. The County expects the offeror to propose a solution based on the requirements of this RFP.

b.) What specific data is needed by the clients to see in their portal?

Please refer to Client Portal Requirements (page 74) of this RFP.

- c.) Yes. DHS has 2 applications available to the public to fill out. Rent Café (Yardi/Voyager) and Farmers Market in house developed.
- d.) Yes. There is an intake/screening process.

#### **QUESTION #35**

There are no proposal response guidelines in the RFP. Are we to only use the Excel spreadsheets (Attachments D and F) for the response, or do you want a separate technical response (WORD/PDF format) as well?

#### **ANSWER #35**

There are proposal guidelines within the posted RFP. Please refer to Section 7 Proposal Submittal Elements in its entirety (Pages 25-28) of this RFP.

#### **QUESTION #36**

If a vendor is submitting a proposal for Category C, will the vendor also automatically be considered for just Category A or B, if another vendor is chosen for one of the categories? How many users will need access to the CSMS? How many users will need access to the HMIS? Will any users need access to both systems? Is the county open to one single database that meets both CSMS and HMIS requirements and allows for configurable limits on data sharing between CSMS and HMIS programs instead of two separate, but integrated databases? Is entering a comment for each requirement on the Conformance Matrix required or is it only necessary if clarification is needed? What code should be entered if the software will comply with the requirement after a future scheduled enhancement? Can the county provide more detail about the goals of the integration with MS Outlook/Exchange? What type of data would need to flow between the case management system and MS Outlook? Can the county provide more legible versions of the Scheduling Queue Flow and CSC Scheduling Process diagrams on pgs 79-80? Can samples of the reports mentioned in Requirements 3.1-3.4 of Attachment F be provided? Regarding the Housing Locator Project requirements (4 on Attachment F): does the county require/desire any integrations that would pull in data related to available housing options in the community? If so, with what source(s) would the county like integrations? Can the county provide an example or more details about how it would like program/activities participation and program specific schedules to be enforced? (In regards to question 5 on Attachment D – Capability Summary, #5 under Scheduling) Can the county provide examples of cases in which batch printing of forms, reports, and letters is needed? Regarding the requirement “maintain clients record of payments” on line 376 of Attachment D Conformance matrix, does this refer to payments that the client makes to the County for services received? If not, can the county provide more information about the type of payments that need to be tracked? What is the definition of a “visitor” in #1 under Navigation on Attachment D – Capability Summary? What information needs to be tracked about visitors?

#### **ANSWER #36**

- a. Each Offeror will be evaluated based on Section 6. Proposal Evaluation Criteria (Page 25) of this RFP. Offerors that proposed option C are automatically considered for both systems. County will select offer(s) that best meet the requirements of this RFP.
- b. Currently there are ~180 concurrent user accounts in CSMS. This number is subject to change.
- c. Currently there ~200 concurrent user accounts in HMIS. This number is subject to change.
- d. Yes.
- e. Is the county open to one single database that meets both CSMS and HMIS requirements and allows for configurable limits on data sharing between CSMS and HMIS programs instead of two separate, but integrated databases?  
The County is open to a database architecture/design that meets all the requirements specified for CSMS and HMIS in this solicitation.
- f. Comments are not required; they are to be used only if clarification is needed.
- g. Offeror should include future scheduled enhancements as part of their proposal.

- h. Can the county provide more detail about the goals of the integration with MS Outlook/Exchange? What type of data would need to flow between the case management system and MS Outlook?

The County’s goal is to exchange data between case management system, scheduling module and MS Outlook. Rules on data exchange and details on data elements involved will be determined during the requirements validation and development of a new system blueprint.

- i. Can the county provide more legible versions of the Scheduling Queue Flow and CSC Scheduling Process diagrams on pgs 79-80?  
An updated version is included in this Addendum.
- j. Can samples of the reports mentioned in Requirements 3.1-3.4 of Attachment F be provided?

Please see samples below.

**Built for Zero Aggregator Report**

From MM/DD/YYYY to MM/DD/YYYY

End-users should be able to filter/sort by any of the report headers.

Name	Case Number	Family Name	Relationship	Family Enterprise Identifier	Site Name	Program Name	Program Start Date	Program End Date	Dismissal Reason	Age	DOB	Gender (HUD)	Race and Ethnicity (HUD)	Veteran Status (HUD)	Chronic Homeless Status
------	-------------	-------------	--------------	------------------------------	-----------	--------------	--------------------	------------------	------------------	-----	-----	--------------	--------------------------	----------------------	-------------------------

**Built for Zero By-Names-List Report**

From MM/DD/YYYY to MM/DD/YYYY

End-users should be able to filter/sort by any of the report headers.

Name	Last Family Name	Relationship	Case Number	Site Name	Program Name	Program Start Date	Age	Gender (HUD)	Race and Ethnicity (HUD)	SPDAT Program	Last SPDAT Score	Veteran Status (HUD)	HUD Assessment Program	Current HUD Start	Chronic Homeless Status
------	------------------	--------------	-------------	-----------	--------------	--------------------	-----	--------------	--------------------------	---------------	------------------	----------------------	------------------------	-------------------	-------------------------

**HMIS Active List: Racial Disparity Report**

From MM/DD/YYYY to MM/DD/YYYY

End-users should be able to filter/sort by any of the report headers.

---

Program Name	Program Start Date	Program End Date	Days in Program	Name	Case Number	Age	DOB	SSN Quality (HUD)	Race/Ethnicity (HUD)	Veteran Status (HUD)	Gender (HUD)	Primary Language Spoken	Dismissal Reason	Exit Destination (HUD)
--------------	--------------------	------------------	-----------------	------	-------------	-----	-----	-------------------	----------------------	----------------------	--------------	-------------------------	------------------	------------------------

**Recidivism**

The request is to have the report table below provide Race/Ethnicity data in the breakdown.

**SPM Measure 2: The Extent to which Persons who Exit Homelessness to Permanent Housing Destinations Return to Homelessness**



	Total # of Persons who exited to a Permanent Housing Destination (2 Years Prior)	Returns to Homelessness in Less than 6 Months		Returns to Homelessness from 6 to 12 Months		Returns to Homelessness from 13 to 24 Months		Number of Returns in 2 Years	
		FY 2024	% of Returns	FY 2024	% of Returns	FY 2024	% of Returns	FY 2024	% of Returns
Exit was from SO			%		%		%		%
Exit was from ES			%		%		%		%
Exit was from TH			%		%		%		%
Exit was from SH			%		%		%		%
Exit was from PH			%		%		%		%
TOTAL Returns to Homelessness			%		%		%		%

- a. Regarding the Housing Locator Project requirements (4 on Attachment F): does the county require/desire any integrations that would pull in data related to available housing options in the community? If so, with what source(s) would the county like integrations?

The County does not require/desire any integration that would pull data related to available housing options in the community.

- b. Can the county provide an example or more details about how it would like program/activities participation and program specific schedules to be enforced?

Please refer to Scheduling requirements (pages 79-83) of this RFP.

- c. Can the county provide examples of cases in which batch printing of forms, reports, and letters is needed?

The County will use batch printing of forms, reports or letters when simultaneously sending information to multiple recipients.

- d. Regarding the requirement “maintain clients record of payments” on line 376 of Attachment D Conformance matrix, does this refer to payments that the client makes to the County for services received? If not, can the county provide more information about the type of payments that need to be tracked?

System should be able to maintain a record(s) of all transactions County makes on client’s behalf.

- e. What is the definition of a “visitor” in #1 under Navigation on Attachment D – Capability Summary? What information needs to be tracked about visitors?

A visitor refers to any individual, such as a client, who may visit either the Customer Service Center (CSC) or the Arlington Employment Center (AEC) front desk seeking service or assistance.

Please see CSMS Functional Requirements General Visits and Client Check in, Arlington Resource Center (AEC) Requirements, Client Check in Kiosks (Pages 2-3) from this RFP.

**QUESTION #37**

Can you provide the number of licensed users by role? For example, case managers/caseworkers, administrators, provider users, partner users, external users, clients, etc.?

**ANSWER #37**

CSMS:

- Enterprise Managers 12
- Site Managers: 32
- Department Heads: 8
- Program Manager 16
- Staff: 103
- Intake: 9
- Funders: 1

HMIS:

Staff	95
Program Manager	5
Site Manager	84
Enterprise Manager	5
Developer	1

**QUESTION #38**

How often does each provider/partner user use the system? Number of logins per month/per year?

**ANSWER #38**

**CSMS:**

- Current daily use during County business hours
- Number of logins per year: 34,054

**HMIS**

- Providers/partners use the system daily 24x7.
- Current Number of logins per year: Approximately 27,651 logins in 2023.

**QUESTION #39**

How often does each client/external user use the system? Number of logins per month/per year?

**ANSWER #39**

Please see reply to question #38.

**QUESTION #40**

Has the County seen any demos/talked to vendors prior to releasing the RFP, if so which vendors and technologies?

**ANSWER #40**

No.

**QUESTION #41**

Are there any data encryption or other requirements for this system? Is FedRAMP a requirement?

**ANSWER #41**

Please refer to all encryption references within this RFP including but not limited to the following: Scope of Service Section A1 Technical Requirements 1.24 (page 13), Section 37 Data Security and Protection, D. Security Requirements (page 38), Non-Disclosure and Data Security Agreement (Contractor) (page 58), Non-Disclosure and Data Security Agreement (Individual) (Page 60) of this RFP. FedRAMP is not a requirement.

**QUESTION #42**

Can offshore resources be used for development of the solution, if production and non-production environments that contain PII/PHI and other confidential information remain in the US and are not accessed by offshore resources, and all data remains in the US?

**ANSWER #42**

Yes.

**QUESTION #43**

What is the budget NTE amount for this project? Has the budget amount been approved/allocated?

**ANSWER #43**

This is a request for proposals (RFP) and price is not an element of the evaluation criteria.

**QUESTION #44**

What is the desired go-live date?

**ANSWER #44**

The County desires a 12-month implementation after contract award.

**QUESTION #45**

"List three organizations for which your firm completed a similar scope of work within the last five years. Specify all local and/or state governments, comparable to Arlington's Department of Human Services, for which you have provided similar services and have successfully implemented of a Customer Service and Case Management System." Will the County also accept references/past performance from Federal clients?

**ANSWER#45**

Yes.

**QUESTION #46**

"List three organizations for which your firm completed a similar scope of work within the last five years. Specify all local and/or state governments, comparable to Arlington's Department of Human Services, for which you have provided similar services and have successfully implemented of a Customer Service and Case Management System." Will the County also accept references/past performance from nonprofit clients?

**ANSWER #46**

Yes.

**QUESTION #47**

Can you provide more detail around the desired formatting and submission requirements for proposal responses?

**ANSWER #47**

Please refer to question #35.

**QUESTION #48**

From Attachment\_D\_CSMS\_Conformance\_and\_Capability\_Matrix - "Prioritize search results to highlight clients existing in the COTS System" - Can you explain and provide more detail around this requirement?

**ANSWER #48**

Client records existing in the new system should be highlighted (or emphasized) and displayed at the top of the search results.

**QUESTION #49**

From Attachment\_D\_CSMS\_Conformance\_and\_Capability\_Matrix - "2. Allow data import from other external sources to manage client searches: a. Real time OR b. Nightly Import (loading about 30,000 records)" - What are those external sources, can you provide details? What kind of integration is required

for each of those systems i.e. File based, Rest API, WS/WSDL? Does any middleware/ETL tool or API gateway exist? If any changes are required to the external system for integration, we assume that the County will be responsible for those changes and will provide SMEs for integration like mapping etc, - Can you confirm? Also, assuming that any firewall, and Access to those systems the County will be responsible for providing in a timely manner. - can you confirm?

**ANSWER #49**

Our current system does not integrate with other systems. The County is interested in procuring a future system(s) that has that capability.

**QUESTION #50**

From Attachment\_D\_CSMS\_Conformance\_and\_Capability\_Matrix -" Allow client data import from DHS DATA WAREHOUSE into client demographic tables or fields once client is determined, by user, to be a match" - What kind of interface it would be? ETL, Nightly batch or Realtime, Can you explain/provide more detail around this please?

**ANSWER #50**

Client data import from DHS Data Warehouse into client demographic tables or fields once client is determined by user to be a match will be Realtime.

**QUESTION #51**

From Attachment\_D\_CSMS\_Conformance\_and\_Capability\_Matrix -" -14. Allow capture of client and worker's signatures " - are there any compliance and audit requirements associated with signature? If the worker can type their name and the system will store it as the signature in the database, or will using touch screen or mouse with signature graphics being stored in the system be sufficient? Can you provide more detail around how you envision e-signature working?

**ANSWER #51**

Offeror(s) should propose any compliance and audit requirements associated with signatures when submitting response to this RFP. Currently, the County uses a touch pad to collect client's and worker's signatures.

The balance of the solicitation remains unchanged.

Arlington County, Virginia  
Sheri Butler, DM, PMP  
Procurement Officer  
[slbutler@arlingtonva.us](mailto:slbutler@arlingtonva.us)

**RETURN THIS PAGE, FULLY COMPLETED AND SIGNED, WITH YOUR PROPOSAL:**

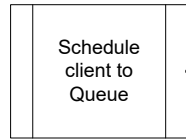
**BIDDER ACKNOWLEDGES RECEIPT OF ADDENDUM NUMBER 1.**

**FIRM NAME:** \_\_\_\_\_

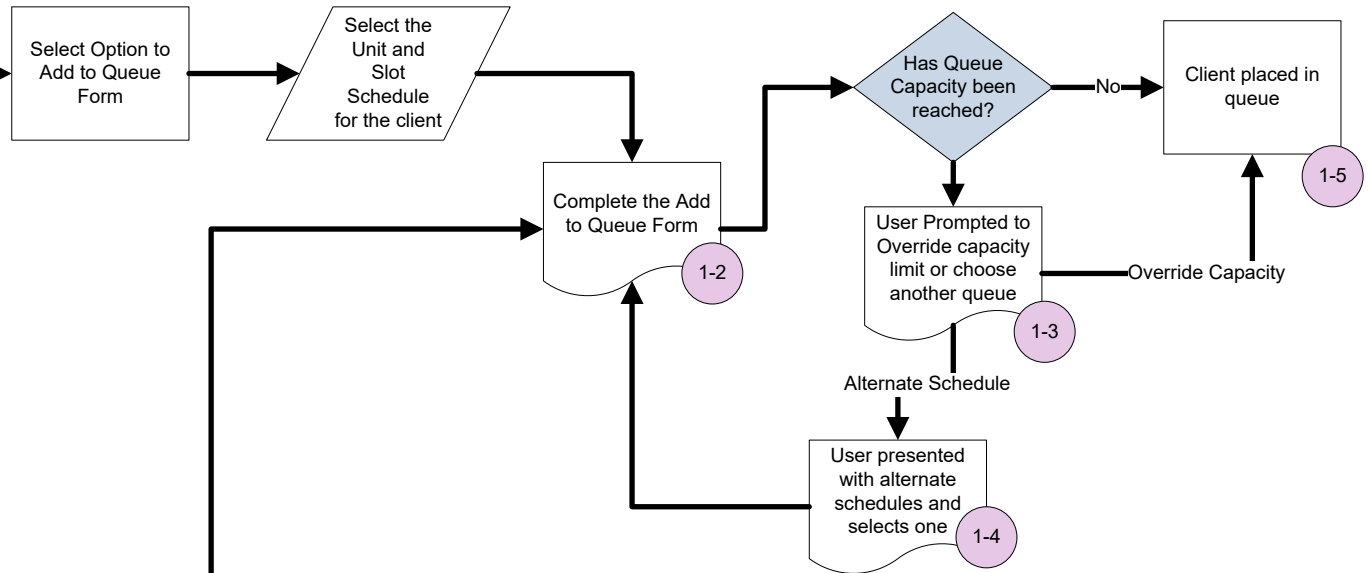
**AUTHORIZED SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

# Scheduling Queue Flow

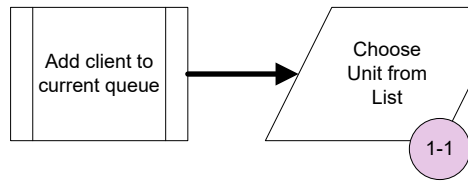
Schedule to Future Queue



Add Client to Queue

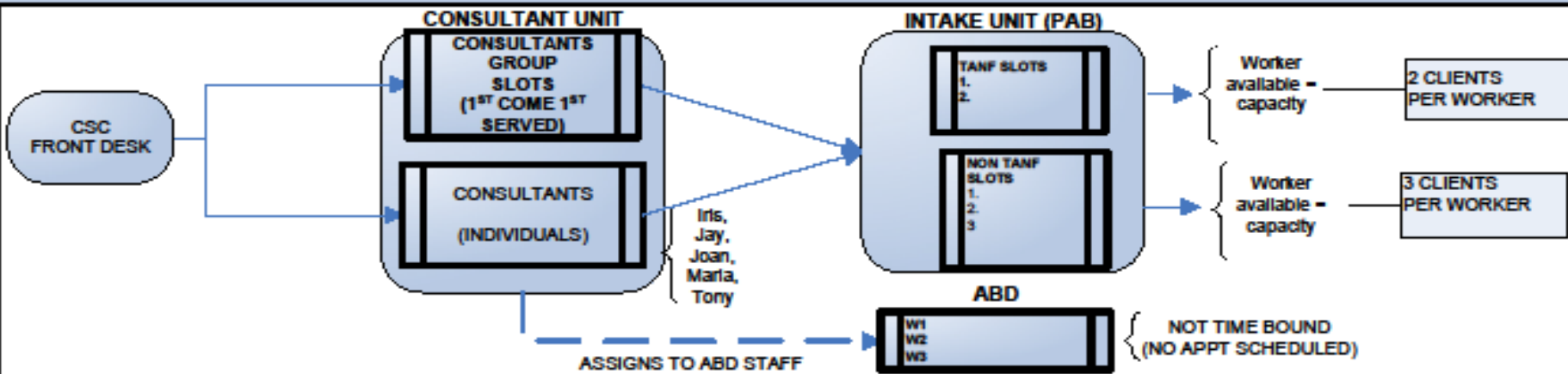


Add Client to Queue

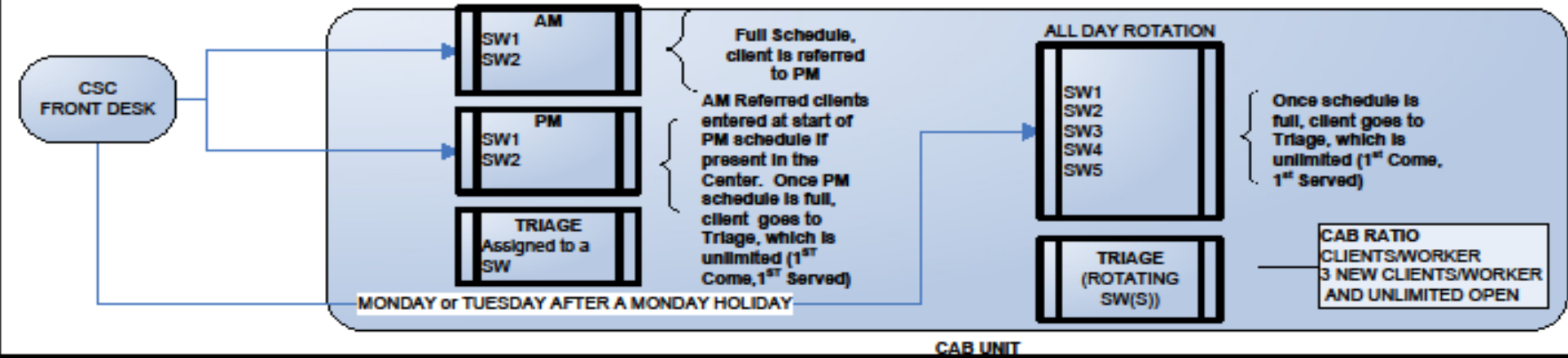


# CSC SCHEDULING PROCESS

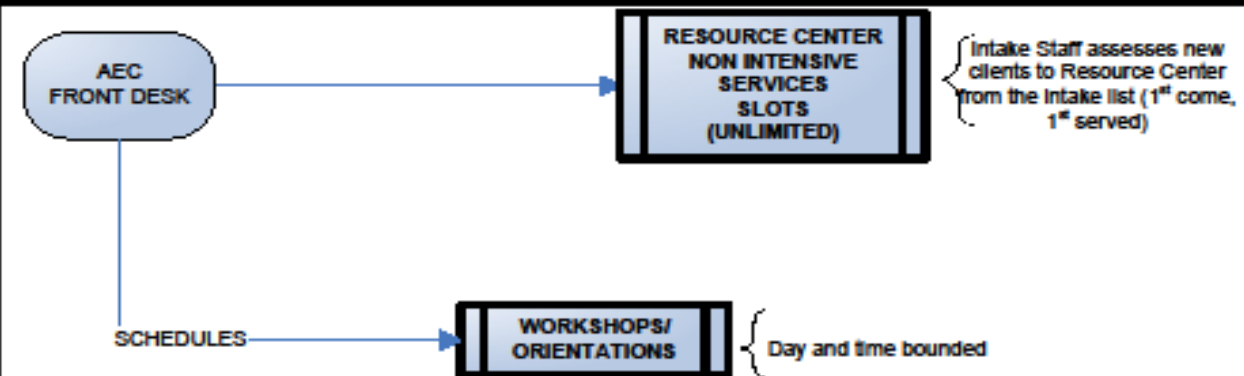
CSC-CONSULTANTS-INTAKE  
(TANF-NONTANF & ABD)



CSC-SOCIAL WORK UNIT



AEC





**ARLINGTON**  
**VIRGINIA**

**Client Service  
Management System  
(CSMS) & Homeless  
Management  
Information System  
(HMIS)**

---

24-DHS-RFP-301

Pre-Proposal Conference

Thursday, February 22, 2024

# Agenda

---

Attendance

Introduction of Arlington County Personnel

RFP Schedule

Submission Requirements

Scope of Services

Questions



# Attendance

---

Please place the following information in the CHAT

- Your Name
- Your Company Name
- Email Address
- Phone Number

# Arlington County Personnel

---

---

Sheri Butler, Procurement Officer

---

Glenda Pittman, Project Officer

---

Martha Coello, IT Program Manager

---

Diane Alvira, Customer Service Employment Bureau Chief

---

David Herlihy, Application & Architecture Division Chief

---

Bonnie Xie, DHS IS Bureau Chief

# Pre-Proposal Conference

---

Attendance to this Pre-Proposal Meeting is not Mandatory

Before submitting a proposal, each Offeror must make all investigations necessary to ascertain all conditions and requirements affecting the full performance of the contract and to verify any representations made by the County upon which the Offeror will rely. No pleas of ignorance of such conditions and requirements will relieve the successful Offeror from its obligation to comply in every detail with all provisions and requirements of the contract or will be accepted as a basis for any claim for any monetary consideration on the part of the successful Offeror.

OFFERORS MUST BE REGISTERED IN VENDOR REGISTRY TO SUBMIT A PROPOSAL FOR THIS REQUEST FOR P

# RFP Schedule

---



February 12, 2024



March 7, 2024, 5:00 PM



April 15, 2024, 4:00 PM

# Scope of Services

---

The purpose of this solicitation and subsequent agreement is to secure the services of a contractor for the provision of two configurable, commercial off the shelf (COTS), cloud-based packages (together the “System”).

1. The Customer Service and Case Management System (CSMS) will be the first COTS package, covering all present and future needs of the County (as detailed in Attachments B and C) for customer service, client intake, client program participation, and client case management.
2. The second COTS package will consist of a Homeless Management Information System (HMIS) that adheres to the current and future requirements from the County and Housing and Urban Development (HUD).

# Scope of Services

---

Offerors may choose to submit proposals for the following categories:

**Category A:** System set up, configuration, training, production implementation, on-going maintenance, and support of a HMIS that adheres to the HUD requirements.

**Category B:** System set up, configuration, training, production implementation, on-going maintenance, and support of a CSMS that supports requirements of customer service, client program participation, intake, and case management non-Homeless programs.

**Category C:** A System with functionality as described in Category A and B with real time bidirectional integration or interface between the two.

# System High-Level Requirements

---

- Functionality Requirements
- Integration & Configuration

# Submittal Requirements

---

- Proposal Form
- Conflict of Interest Statement
- Business Associate Agreement
- Nondisclosure and Data Security Agreements (Contractor & Individual)
- CSMS Conformance Matrix and Capabilities Summary
- HMIS Conformance Matrix and Capabilities Summary
- Cost Proposal



# Questions

---

All communications relating to this solicitation must be submitted online using Vendor Registry. For a question to be considered, the question must be entered in the Question Section of the RFP No. **24-DHS-RFP-301**.

# Thank you

---

Sheri Butler, Procurement Officer

[Slbutler@arlingtonva.us](mailto:Slbutler@arlingtonva.us)

Phone: 703-228-1895

\*\*Please contact [Sheri Butler](#) for all information relating to this procurement.\*\*



**Arlington County Government**  
Office of the Purchasing Agent  
Non-Mandatory Pre-Proposal Conference Attendees List

**FOR:**

Arlington DHS- Customer Service and Case management System  
and Homeless management Information System

**DATE & TIME:**

February 22, 2014 at 11:00 a.m.

**PLACE:**

Microsoft Teams Meeting \_\_\_\_\_

**BID/PROPOSAL**

24-DHS-RFP-301

**PLEASE WRITE CLEARLY**

Name	Sheri Butler, Procurement Officer
Company	Arlington County Government
E-mail	<a href="mailto:slbutler@arlingtonva.us">slbutler@arlingtonva.us</a>
Phone #	(703) 228-1895

Name	Martha Coella
Company	Arlington County Government
E-mail	<a href="#"><i>Please contact Sheri Butler for all questions relating to this procurement</i></a>
Phone #	

Name	Diane Alvira
Company	Arlington County Government
E-mail	<a href="#"><i>Please contact Sheri Butler for all questions relating to this procurement</i></a>
Phone #	

Name	Michael Keen
Company	Arlington County Government
E-mail	<a href="#"><i>Please contact Sheri Butler for all questions relating to this procurement</i></a>
Phone #	

Name	Monica Malik
Company	Arlington County Governement
E-mail	<a href="#"><i>Please contact Meloni Hurley for all questions relating to this procurement</i></a>
Phone #	

Name	Bonnie Xie
Company	Arlington County Government
E-mail	<a href="#"><i>Please contact Sheri Butler for all questions relating to this procurement</i></a>
Phone #	



**Arlington County Government**  
Office of the Purchasing Agent  
Non-Mandatory Pre-Proposal Conference Attendees List

**FOR:**

Arlington DHS- Customer Service and Case management System  
and Homeless management Information System

**DATE & TIME:**

February 22, 2014 at 11:00 a.m.

**PLACE:**

Microsoft Teams Meeting

**BID/PROPOSAL**

24-DHS-RFP-301

Name	Jonatan Morales
Company	Arlington County Government
E-mail	<a href="#">Please contact Sheri Butler for all questions relating to this procurement</a>
Phone #	

Name	Meheret Asfaw
Company	Arlington County Government
E-mail	<a href="#">Please contact Sheri Butler for all questions relating to this procurement</a>
Phone #	

Name	Triina Van
Company	Arlington County Government
E-mail	<a href="#">Please contact Sheri Butler for all questions relating to this procurement</a>
Phone #	

Name	David Herlihy
Company	Arlington County Government
E-mail	<a href="#">Please contact Sheri Butler for all questions relating to this procurement</a>
Phone #	

Name	Rebecca Kwon
Company	CoreSphere
E-mail	<a href="mailto:Rebecca.Kwon@coresphere.com">Rebecca.Kwon@coresphere.com</a>
Phone #	(215) 913-5540

Name	Deb Bell
Company	Southpoint Consulting
E-mail	<a href="mailto:dbell@southpointconsulting.com">dbell@southpointconsulting.com</a>
Phone #	(703) 209-7161

Name	Brian Zernhelt
Company	Cyquent, Inc.
E-mail	<a href="mailto:Brian.Zernhelt@cyquent.com">Brian.Zernhelt@cyquent.com</a>
Phone #	(215) 913-5540

Name	Melissa Meisenheimer
Company	CaseWorthy, Inc
E-mail	<a href="mailto:mmeisenheimer@caseworthy.com">mmeisenheimer@caseworthy.com</a>
Phone #	(803) 989-3532

Name	Stephanie Crouch
------	------------------

Name	Rocky M
------	---------



**Arlington County Government**  
Office of the Purchasing Agent  
Non-Mandatory Pre-Proposal Conference Attendees List

**FOR:**

Arlington DHS- Customer Service and Case management System and Homeless management Information System

**DATE & TIME:**

February 22, 2014 at 11:00 a.m.

**PLACE:**

Microsoft Teams Meeting \_\_\_\_\_

**BID/PROPOSAL**

24-DHS-RFP-301

Company	CaseWorthy, Inc
E-mail	<a href="mailto:scrouch@caseworthy.com">scrouch@caseworthy.com</a>
Phone #	(866) 633-4753 x788

Company	Cyquent, Inc.
E-mail	<a href="mailto:rocky.m@cyquent.com">rocky.m@cyquent.com</a>
Phone #	not provided

Name	Ravi Shastri
Company	MetaMeta LLC
E-mail	<a href="mailto:ravi.shastri@metameta.us">ravi.shastri@metameta.us</a>
Phone #	(703) 499-0112

Name	Lanie Honeycutt
Company	Son Information Systems
E-mail	<a href="mailto:Lanie.Honeycutt@son-is.com">Lanie.Honeycutt@son-is.com</a>
Phone #	(614) 636-1022

Name	Matthew Grady
Company	Ready Computing
E-mail	<a href="mailto:matthew.grady@readycomputing.com">matthew.grady@readycomputing.com</a>
Phone #	(212) 877-3307 x 3004

Name	Jessica Cooper
Company	Casebook PBC
E-mail	<a href="mailto:jessica.cooper@casebook.net">jessica.cooper@casebook.net</a>
Phone #	(423) 306-8233

Name	Dale Wilkinson
Company	Cloud SynApps, Inc.
E-mail	<a href="mailto:dale.wilkinson@cloudsynapps.com">dale.wilkinson@cloudsynapps.com</a>
Phone #	(319) 400-6058

Name	Niraj Jagasia
Company	Cyquent
E-mail	<a href="mailto:niraj.jagasia@cyquent.com">niraj.jagasia@cyquent.com</a>
Phone #	(571) 426-8456

Name	Jay Majmudar
Company	CoreSphere
E-mail	<a href="mailto:jay.majmudar@coresphere.com">jay.majmudar@coresphere.com</a>
Phone #	(301) 728-8743

Name	Victoria Haugen
Company	Guidehouse
E-mail	<a href="mailto:vhaugen@guidehouse.com">vhaugen@guidehouse.com</a>
Phone #	(843) 813-0112

Name	Jeff Kuhlman
------	--------------

Name	Shasi Roy
------	-----------



**Arlington County Government**  
Office of the Purchasing Agent  
Non-Mandatory Pre-Proposal Conference Attendees List

**FOR:**

Arlington DHS- Customer Service and Case management System  
and Homeless management Information System

**DATE & TIME:**

February 22, 2014 at 11:00 a.m.

**PLACE:**

Microsoft Teams Meeting \_\_\_\_\_

**BID/PROPOSAL**

24-DHS-RFP-301

Company	CITI
E-mail	<a href="mailto:jkuhlman@citi-us.com">jkuhlman@citi-us.com</a>
Phone #	(217) 971-6044

Company	Creative Information Technology, Inc.
E-mail	<a href="mailto:sroy@citi-us.com">sroy@citi-us.com</a>
Phone #	(571) 484-1050

Name	Benjamin Richmond
Company	CAMP
E-mail	<a href="mailto:brichmond@appliedmgt.com">brichmond@appliedmgt.com</a>
Phone #	(717) 810-6200

Name	Sohrab Zibaii
Company	CoreSphere
E-mail	<a href="mailto:sohrab.zibaii@coresphere.com">sohrab.zibaii@coresphere.com</a>
Phone #	(619) 214-0218

Name	Nicale Nxumalo
Company	Southpoint Consulting, Inc
E-mail	<a href="mailto:nnxumalo@southpointconsulting.com">nnxumalo@southpointconsulting.com</a>
Phone #	(703)725-6515

Name	Shailesh Gupta
Company	CoreSphere, LLC,
E-mail	<a href="mailto:sgupta@coresphere.com">sgupta@coresphere.com</a>
Phone #	(301) 637-3216

Name	Julia Bouchard
Company	Casebook PBC
E-mail	<a href="mailto:aashna.bhardwaj@cloudsynapps.com">aashna.bhardwaj@cloudsynapps.com</a>
Phone #	(647) 881-9733

Name	Ashwin Saboo
Company	Creative Information Technology, Inc.
E-mail	<a href="mailto:asaboo@citi-us.com">asaboo@citi-us.com</a>
Phone #	(240) 421-8179

Name	Fernando Espinoza
Company	Guidehouse
E-mail	<a href="mailto:fespinoza@guidehouse.com">fespinoza@guidehouse.com</a>
Phone #	(571) 612-0168

Name	Candice Hacker
Company	WellSky
E-mail	<a href="mailto:Candice.hacker@WellSky.com">Candice.hacker@WellSky.com</a>
Phone #	703-657-1476

Name	Rachel Sasse
------	--------------

Name	Sagar Sawant
------	--------------



**Arlington County Government**  
Office of the Purchasing Agent  
Non-Mandatory Pre-Proposal Conference Attendees List

**FOR:**

Arlington DHS- Customer Service and Case management System  
and Homeless management Information System

**DATE & TIME:**

February 22, 2014 at 11:00 a.m.

**PLACE:**

Microsoft Teams Meeting \_\_\_\_\_

**BID/PROPOSAL**

24-DHS-RFP-301

Company	WellSky
E-mail	<a href="mailto:rachel.sasse@WellSky.com">rachel.sasse@WellSky.com</a>
Phone #	703-657-1476

Company	Cyquent Inc.
E-mail	<a href="mailto:ssawant@cyquent.com">ssawant@cyquent.com</a>
Phone #	(410) 227-1117

Name	
Company	
E-mail	
Phone #	

Name	
Company	
E-mail	
Phone #	

Name	
Company	
E-mail	
Phone #	

Name	
Company	
E-mail	
Phone #	

Name	
Company	
E-mail	
Phone #	

Name	
Company	
E-mail	
Phone #	

Name	
Company	
E-mail	
Phone #	

Name	
Company	
E-mail	
Phone #	