CHARLOTTE-MECKLENBURG CONTINUUM OF CARE

Governing Board Meeting: Thursday, December 15, 2022
Location: 3205 Freedom Drive, Entrance D, Suite 2000
& Zoom: https://mecknc.zoomgov.com/j/16101411994?pwd=MkEzZXU1cmRyeFVQelNtdHV0K1ZBZz09

Board Members			
Anna London, Chair	Deronda Metz, Vice Chair	Trish Hobson, Secretary	Kathryn Firmin-Sellers
Sonia Jenkins	Brian Kovaleski	Karen Pelletier	Warren Wooten
James Searcy	Hope Marshall	Kaedon Grinnell	James Lee
Kenny Robinson	Jane Shutt	Timica Melvin	Elizabeth Trotman
Lucy Crain	Brittany Marshall	Tchernavia Montgomery	Kim Ciepcielinski

Agenda

Time	Item	Facilitator
2:00pm-2:05pm	Welcome, attendance **Motion: Adopt meeting agenda**	Anna London Branden Lewis (attendance)
2:05pm-2:15pm	Executive Committee Report Out • Board member survey • 2023 CoC Board slate (in process) • **Motion: Adopt 2023 CoC Board meeting calendar** • **Motion: Approve meeting minutes: November 17, 2022**	Anna London
2:15pm-2:25pm	A Home for All Framework Implementation	Kathryn Firmin-Sellers
2:25pm-2:35pm	Homeless Services Network Update	
2:35pm-2:45pm	Chronic Homelessness Workgroup Report Out **Motion: Approve utilizing planning grant funds for community Housing First Trainings & TA**	Karen Pelletier, Chair
2:45pm-2:55pm	Coordinated Entry Oversight Committee Report Out	Hope Marshall, Chair
2:55pm-3:30pm	Collaborative Applicant Staff Updates: 1. HMIS Software RFP **Motion: Approve HMIS sub-committee's recommendation to move to Bit Focus Link to view Bitfocus Demo:** https://us06web.zoom.us/rec/share/FWBmmBrcLU4YjZH-CfkA64mErd4qVY5BhmGmHaq9CaxXrjnoqxOGbSQZmJVBnh8.memAJznxmlLAm-oI Passcode: !UEAx^7$ 2. Landlord Engagement System Work 3. Point in Time Count	Mary Ann Priester Branden Lewis Erin Nixon
3:30pm-3:45pm	Public Comment	Anna London
3:45pm-4:00pm	Agency Updates Request for January meeting agenda items	All
4:00pm	Adjourn	Anna London

Next CoC Full Membership meeting: January 11, 2023; 2:00pm-3:30pm
Next CoC Governing Board meeting: Monday, January 23, 2023; 1pm-3pm

Our Vision: Homelessness is rare, brief and non-recurring in the Charlotte-Mecklenburg Community. Everyone has housing choices and prompt access to a variety of housing resources and supports that meet their needs.

Charlotte-Mecklenburg Continuum of Care Governing Board

2023 Meeting Calendar

Date	Time
Monday, January 23, 2023*	1pm-3pm
Thursday, February 23, 2023	2pm-4pm
Thursday, March 23, 2023	2pm-4pm
Thursday, April 27, 2023	2pm-4pm
Thursday, May 25, 2023	2pm-4pm
Thursday, June 22, 2023	2pm-4pm
Thursday, July 27, 2023	2pm-4pm
Thursday, August 24, 2023	2pm-4pm
Thursday, September 28, 2023	2pm-4pm
Thursday, October 26, 2023	2pm-4pm
Thursday, November 16, 2023**	2pm-4pm
Thursday, December 21, 2023**	2pm-4pm

*adjusted due to PIT count taking place on 1/26/23

**adjusted due to holidays

CoC Governing Board
Meeting Minutes
November 17, 2022

The meeting of the CoC Governing Board was held on November 17, 2022, in-person at Hearts United for Good (2920 North Tryon St., Charlotte, NC 28206). Anna London, Board Chair called the meeting to order at 2:35pm.

Board Members Present: Jane Shutt, Tchernavia Montgomery, Anna London, Karen Pelletier, Warren Wooten, Kim Ciepcielinski, Deronda Metz, Kenny Robinson, Kathryn Firmin-Sellers

Board Members Absent: Sonia Jenkins, Elizabeth Trotman, Timica Melvin, James Searcy, Lucy Crain, Brian Kovaleski, Hope Marshall, Kaedon Grinnell, James Lee, Brittany Marshall

CoC Staff Present: Branden Lewis, Erin Nixon

Guests Present: Kenya Dawson (Mecklenburg County CSS), Laura Gorecki (Project Outpour), Jessica Lefkowitz (Hearts for the Invisible), Ron Clark (Camino Health Center), Janie Cuthbertson (CoC Lived Experience Committee), Alisha Simmons-Hobson (The Salvation Army), Amber Graves (YAB), Jazmin Royall (YAB)

Welcome (Anna London), Attendance (Branden Lewis): Quorum not present. Members of the public introduced themselves with name and organization.

Executive Committee Report Out (Anna London): The Executive Committee has had conversations around a CoC Board retreat. Potential consultant, ROI Consulting. Will start with a survey asking Board members what they want to see and then build out the retreat.

Home for All Framework Implementation Update (Kathryn Firmin-Sellers): First Technical Committee meeting held last month. Consultants are doing an exercise to get the costs to see what it would really take to get all subsidy, housing and supportive services funded and to see how things should be prioritized to gain traction on in the next few years. The next meeting will be scheduled for early December. Advisory Committee will be formed soon. Evaluation Manager and Strategy Coordinator positions are still open.

Chronic Homelessness Workgroup Report Out (Karen Pelletier): 485 people chronically homeless as of September 30, 2022. Working on Transfer Policy to Moore Place. Developing a clearer process and strengths-based approach. Working on Written Standards update and will bring back to Board next month. Also looking at Housing First training for the CoC.

Youth Action Board Report Out (Jazmin & Amber): Q&A Session with Amber and Jazmin. YAB members are currently conducting outreach. They would also like to get members trained in motivational speaking. They'd like to spread the word about what they can do to help and increase membership, especially among males. The CoC Governing Board can help support the priorities of the YAB by encouraging youth served in their programs to get connected to the YAB. They would also like assistance with communications/marketing and promoting their events. Interested in hosting a resource fair for youth and young adults in the Spring.

Collaboration to Address Gaps in the Homeless Services System:

- **Deronda Metz, The Salvation Army:** Partnered with UW, City and HC to move people from hotels. Worked closely with MCPH during the pandemic along with the hospital systems. Also worked with RA when the shelter had to be cleared out. Worked with the City, County, and State to create a space for intact families.
- **Kenny Robinson, Freedom Fighting Missionaries:** Included in the Emergency Housing Voucher program and have successfully housed individuals/families. Created a way to fill the gaps between rate of unit and the voucher amount. FFM and Crisis Assistance Ministry were able to assist.
- **Laura Gorecki: C**ollaborative event held on Sugar Creek that served over 100 individuals
- **Jessica Lefkowitz: G**ap identified of assistance with obtaining identification and school records. Met someone who can assist with those items and has been a great resource.
- Idea: Amazon Web Services for important documents (Don Jonas) Kathryn will connect Jessica L., Jessica G., Deronda and RA staff.

Collaborative Applicant Staff Updates (Branden Lewis, Erin Nixon):

1. **Landlord Engagement System Work:** Erica Snyder in Charlotte December 6 & 7.
2. **HMIS Software RFP:** Have done demos with 5 companies and hope to bring a recommendation to the EC and then to the Board.
3. **Point In Time Count:** January 25, 2023, everyone encouraged to participate/volunteer. Tchernavia stated that the women of Delta Sigma Theta Sorority, Inc. would be glad to assist. Branden will create a flyer to be shared.

Agency Updates (All):

Laura Gorecki: HSN Conference held today, about 60 people in attendance. Gaps identified: youth services, healthcare, more coordination among providers, identification, program requirements, wrap around services, transportation.

Ron Clark: HSN Homeless Vigil tonight, November 17, 2022, at 6:30pm.

Kenny Robinson: Photo Documentary will be held at Mint Museum, December 6, 2022, 6:00pm-9:00pm. Highlighting 17 individuals in the community who support the work of FFM.

Meeting adjourned at 3:57pm

HOUSING FIRST University

Learn From People Who Do This Work Every Day

Pathways to Housing PA

Proposal to

Mecklenburg County, NC

For

Training & Technical Assistance

Date: 12/5/2022

5201 Old York Road, 4th Floor • Philadelphia, PA 19141 • 215-390-1500 ext. 1708 • training@pthpa.org

Background

In 2008, the City of Philadelphia engaged Pathways to Housing PA to bring the evidence-based Housing First model to Philadelphia to help end chronic homelessness. We've seen extraordinary outcomes since that time: we initially housed 125 individuals in 2008, and we currently house more than 550+. Our mission is to empower people with disabilities to improve their housing stability, achieve better health, and reclaim their lives.

Through the Housing First model, we have developed a successful path out of homelessness, ensuring safe and stable permanent scattered site housing for some of our most vulnerable neighbors in Philadelphia. This innovative method has proven to be successful; our organization has achieved an unprecedented 85% housing retention rate (5+ years later) with clients that are considered not housing ready by other programs.

Pathways was the first organization ever to utilize the Housing First model for a dedicated team of participants with opioid use disorder and polysubstance use disorder in a scattered site environment. Since our founding, our comprehensive services have grown to include three modified Assertive Community Treatment (ACT) teams addressing the needs of individuals with opioid use disorder and polysubstance use disorder, in addition to four teams serving individuals with one or more mental health disabilities including substance use disorder. We have also established a satellite site of a Federally Qualified Health Center (FQHC) at our offices to provide primary care services for these vulnerable and underserved populations, launched a medication-assisted treatment program for opioid users, and balanced research and additional services through a myriad of federal grants and awards.

In October of 2019, Pathways launched its formal training initiative, Housing First University (HFU), in order to share our wealth of expertise with others. HFU specializes in helping others to learn and implement best practices for working with individuals struggling with chronic homelessness, serious and persistent mental illness, substance use, traumatic life events, criminal justice involvement, institutionalization, and other disabilities.

The HFU training staff is made up of clinicians, service providers, and leadership with almost a century of combined experience, who work from a strengths-based and harm reduction focused perspective. We have extensive experience creating and modifying curricula to suit a wide variety of diverse community audiences, from social services agencies to health departments, faith-based groups, and professional organizations. Our goal is to invite clients into our circle of expertise to collaboratively build strong programs that best suit their community's needs. The difference in our training, compared to some other training providers, is that we actually do this work – every single day.

Scope of Work

See attached Scope of Work.

Continuing Education

Social workers: Housing First University: a program of Pathways to Housing PA, Provider number 1759, is approved to offer social work continuing education by the Association of Social Work Boards (ASWB) Approved Continuing Education (ACE) program. Organizations, not individual courses, are approved as ACE providers. State and provincial regulatory boards have the final authority to determine whether an individual course may be accepted for continuing education credit.

Contract Terms and Conditions

Housing First University provides training, technical assistance, and consultation services on an hourly basis. The current rate for one trainer is $150 per hour, and two trainers is $300 per hour. All trainings and most technical assistance sessions utilize two trainers to best meet agency needs. The rate for C-Suite staff members is $250 per hour.

Prep time and follow-up time is billed at $150 per hour and is required to format the virtual learning environment, analyze training data, and provide certificates of attendance to staff.

Follow-up consultation may also be provided on an hourly basis at the rate of $150 per consultant per hour.

Services may be provided virtually or in-person, based on current CDC guidelines and HFU staffing availability. For in-person services, travel time is billed at $75/hour per trainer, with mileage calculated at the federal rate and tolls at cost, or flights at cost. Accommodations, meals at the federal per diem rate, and other incidentals are billed at actual cost.

A monthly invoice will be sent to your agency following services rendered and payment may be remitted via check or credit card within 30 days.

Cost Estimate:

Service	# of Events	# of Hours	Cost
Training series	15	30	$15,600
Technical Assistance package	Varies	30	$4,500
		Subtotal	$20,100
		Indirect (15%)	$3,015
		Total	**$23,115**

Travel expenses are not included in the above estimate.

Agreement

If you agree with the contents of this proposal, please sign below to authorize Housing First University, aprogram of Pathways to Housing PA, to begin this work.

Karen Pelletier, MSW
Division Director
Housing Innovation & Stabilization Services
Mecklenburg County Community Support Services

Date

Andrew Spiers, LSW
Director of Training & Technical Assistance
Pathways to Housing PA

Date

Statement of Work
from Housing First University, a program of Pathways to Housing PA,
to Mecklenburg County, NC
2 November 2022

Training

Trainings can be offered as a package or a la carte. All trainings can be generalized or tailored to the unique needs of the audience members and area of practice (direct service, peer specialists, clinical leadership, administrative, housing department, etc.). Agency may choose to hold multiple sessions of each training for different staff members based on scheduling needs and budget. Each session includes relevant tip sheets, suggested further reading, and will allot for ample Q&A time to discuss practice issues.

Topic Area	Description	Number of Trainers	Hourly Rate	Proposed Hours	Prep & FU Time	Total
Housing First	**Training series kick-off event**	2	$300	1.5 hours	2 hours	$750
	The Housing First Philosophy	2	$300	2 hours	3 hours	$1050
	Housing First: How and Why It Works	2	$300	2.5 hours	3 hours	$1200
	Applied Housing First and Harm Reduction Strategies	2	$300	2 hours	3 hours	$1050
	Procuring housing and building relationships with landlords	2	$300	2 hours	3 hours	$1050
	Community inclusion in homelessness recovery	2	$300	2 hours	3 hours	$1050
	Integrated care and Housing First	2	$300	2 hours	3 hours	$1050
	Deliverable: Live/virtual interactive training for up to 50 attendees, with Q&A period, tip sheets, and suggested further reading.			*Total 14 hours*	*20 hours at $150/hour*	***Total $7,200***
Service Delivery	**Using the team approach in case management**	2	$300	2 hours	3 hours	$1050
	The peer role in our service system	2	$300	2 hours	3 hours	$1050
	Home visits: why and how to do them	2	$300	2 hours	3 hours	$1050
	Understanding Racial Disparities in Homelessness	2	$300	2 hours	3 hours	$1050

	Uncovering Implicit Bias	2	$300	2 hours	3 hours	$1050
	Culturally responsive services: From competence to humility	2	$300	2 hours	3 hours	$1050
	Crisis Intervention & de-escalation	2	$300	2 hours	3 hours	$1050
	Assertive engagement	2	$300	2 hours	3 hours	$1050
	Deliverable: Live/virtual interactive training for up to 50 attendees, with Q&A period, tip sheets, and suggested further reading			*Total 16 hours*	*24 hours at $150/hour*	***Total $8,400***
Total Training Cost Estimate……..				**30 hrs**	**44 hours**	**$15,600**

Technical Assistance

All technical assistance offerings listed below may be purchased as a package or a la carte, based on agency priority, need, and budget. Additional affinity groups may be identified and utilized/substituted as appropriate (ex. Community Inclusion staff, Integrated Care staff, etc.). Proposed number of hours, frequency, and duration of technical assistance services may be modified at the contracting agency's discretion.

Service	Description	Frequency	Duration	Hourly Rate	Proposed Hours	Total
Individualized Coaching	Peer Supervision for project staff needing support, consultation, and/or coaching. **Deliverable**: Video conference with relevant Pathways staff member, and follow-up resources	As needed	1 hour (variable)	$150 per trainer (C-Suite staff @ $250 per hour)	30	$4,500

Total Scope Estimate:

Training ($15,600) + TA ($4,500) **= $20,100**

See attached proposal for final pricing details.

Section 3.1 Letter of Transmittal

Dear Mecklenburg County Review Committee,

On behalf of Bitfocus, I am pleased to submit this proposal to provide Mecklenburg County with an HMIS solution for the Mecklenburg County Continuum of Care, as well as their partner agencies, programs, and services. We are excited for the opportunity to collaborate with Mecklenburg County in their efforts to improve their HMIS to better reinforce mission to support HMIS users and clients in need in Mecklenburg County. The CoC will join thousands of other homeless housing and service providers across the nation who rely on Clarity Human Services as their HMIS. Together, we can prevent homelessness whenever possible and work collaboratively to ensure it is a rare, brief, and one-time experience.

Our company's journey started in 2003, when Las Vegas, NV, hired us as their HMIS system administrator. We were (and still are) on the frontlines of their HMIS. We built Clarity Human Services from the ground up to be the HMIS we always wanted. From first outreach to program exit, Clarity Human Services facilitates a client's full journey through the homeless delivery system. More than just HMIS software, it's the infrastructure upon which communities build their systems of care.

Our staff, comprising over 95 talented individuals, remains steadfastly focused on leveraging technology to advance solutions to homelessness. The depth and breadth of our policy and regulatory experience inform everything we do at Bitfocus, and we hope you see that reflected throughout Clarity Human Services.

Confidential Information

The following information within our proposal must remain confidential: pricing information, discounts, security information (SOC 2, internal policies and procedures, etc.), company financial disclosures, references, and the names and contact information of our references.

As detailed in this proposal, our experience, qualifications, and results are among the most respected in the field. We look forward to building upon these successes by providing you with the high-quality, user-friendly, person-centered data collection tools necessary to serve your clients at every stage of need.

Warmly,

Jeff Ugai
Chief Operating Officer
(808) 378-7080 – jeff@bitfocus.com
Bitfocus 5940 S Rainbow Blvd Ste 400 #60866, Las Vegas, Nevada 89118-2507

The information contained in this proposal or any part thereof, including any exhibits, schedules, and other documents and instruments delivered or to be delivered to County, is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead County as to any material facts.

Section 3.2 Executive Summary

A summary describing the vendor's understanding of the County's requirements/specifications and the proposed solution.

- **A proposed total cost for the project.**

$247,570. Please see the attached price quote in the Supplemental Information.

- **A brief summary of the proposed total cost.**

Please see the attached price quote in the Supplemental Information for an itemized cost proposal. The costs are broken down into one-time start-up costs ($110,650) and ongoing annual fees ($136,920).

- **A summary of the approach to be undertaken to perform the services.**

Here is a general summary of the implementation process.

- Planning: During this phase, our team will work with you to finalize the project plan and conduct system inventory and mapping to establish an accurate inventory of all programs and services within the system.
- Training: System administration team and local users will be trained on how to use Clarity Human Services.
- Configuration: Our team will work with the local system administrators to make sure the system is optimally configured.
- Data Migration: Our Data Services experts will work with your team to complete HUD and Custom legacy client data as applicable to your implementation.
- Go-live!

For more information on our approach, please see the General Gantt Chart + Narrative in the Supplemental Information.

- **Highlights any superior or unique aspects of the proposal.**

Company Overview

Bitfocus is a software and consulting company committed to using data and technology to transform Human Services and drive positive social change. We empower communities nationwide who are looking for better ways to use technology, data, and policy to improve their systems of care.

The Bitfocus Team is an interdisciplinary collection of subject matter experts with backgrounds that are highly relevant to the customers we serve. Collectively, our staff includes dedicated data analysts and engineers, certified project management professionals, former federal technical assistance providers, certified privacy professionals, and former social workers and case managers.

Our product, Clarity Human Services, has been built from the ground up specifically for HMIS. It's an efficient, usable, and dependable software that adheres to industry best practices for web design and cloud hosting. It ensures faultless compliance and has customizable features that facilitate case management, coordinated entry, and powerful business intelligence to help communities understand the story underlying their data.

Our Community HMIS Administration consulting services heavily inform the development of Clarity Human Services software. We partner closely with our communities to meet their needs related to data collection and analysis around homelessness. In short, we use our own software in the field, and this hands-on experience with our own code shapes its development into the most powerful, productive, and user-friendly software in the marketplace.

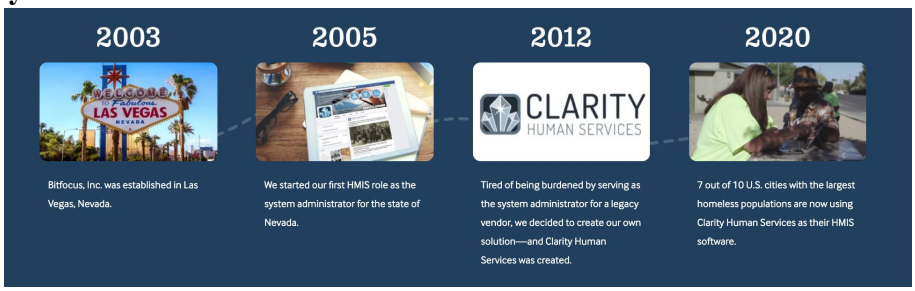
Our Story: Purpose-Driven Development

Bitfocus launched in 2003 with our enlistment as HMIS System Administrator for Las Vegas, Nevada. Right from the start, we propelled the very front lines of their implementation—training end-users, running reports, and working shoulder-to-shoulder with CoC leadership as we strove to better serve their homeless population. Our legacy vendor certainly didn't make the job easy. Confident we could do more with better, less cumbersome software, we built Clarity Human Services from the ground up to be the HMIS system we always wanted - and needed.

Clarity Human Services was designed based on necessity, which is why it is so much more than just HMIS software; it's the very infrastructure upon which communities build their systems of care.

Today, nearly 19 years later and 95 employees stronger, Bitfocus is still deeply committed to leading the development of the next generation of tools and technology that will empower human services professionals to serve their clients in new and innovative ways.

Company Milestones



Our Customers

No one knows HMIS better than us. With over 68 CoCs across more than 40 implementations, Clarity Human Services is the nation's fastest-growing HMIS solution. We proudly partner with the nation's largest communities—including Los Angeles, San Francisco, San Diego, Las Vegas, Boston, Seattle, and the State of Colorado. Seven of 10 cities with the largest homeless populations use Clarity Human Services, and we serve 8 statewide implementations (Washington, Wisconsin, Nebraska, Nevada, Colorado, Rhode Island, New Hampshire, and Vermont)

Together we are creating the technology infrastructure that enables a more efficient and effective homeless response system and empowering decision-makers with a better understanding of the nature and extent of homelessness in their communities.

85+ Happy Customers | 20,000+ Active Users | 4,000+Agencies | 12,500+Programs

Our Business Model

**ag·ile | \ ˈa-jəl , -ˌjī(-ə)l **
Definition of agile
1: marked by ready ability to move with quick easy grace
2: having a quick resourceful and adaptable character

Bitfocus embodies agility when it comes to both our product and our company operations; we both create and adapt to change. Human Services is a turbulent environment, and this approach serves us well in our ability to not only survive but thrive, in its constant fluctuations.

An Agile Product

The Clarity Human Services software is developed within the Agile Methodology. Agile Methodology is an umbrella term for a set of frameworks and practices based on the values and principles of the Agile Manifesto:

Individuals and interactions over processes and tools
Working software over comprehensive documentation
Customer collaboration over contract negotiation
Responding to change over following a plan

The Bitfocus Agile development of Clarity Human Services breaks product development work into small increments that minimize the amount of up-front planning and design. Our Iterations, or sprints, are short time frames (timeboxes) that typically last from one to four weeks. Each iteration involves a cross-functional team working in all functions: planning, analysis, design, coding, unit testing, and acceptance testing. At the end of the iteration, we release the working product for UAT testing, and subsequently to live sites.

An Agile Company Mindset

Agile Methodology is unique in that it emphasizes the importance of the people doing the work, and more specifically, how they collaborate in a cross-functional manner. This is why Bitfocus extends its Agile Methodology beyond our software development to all areas of the company. This approach allows requirements and solutions to evolve through the collaborative effort of our cross-functional teams. Each team at Bitfocus operates according to their own separate ongoing continuous series of small development cycles aka “sprints” that help to keep the focus on bringing continuous improvement in the work processes of their particular departments.

By bringing this Iterative Development, (which is typically reserved only for software development in most companies), to all teams at Bitfocus, we are able to harness its ability to bring continuous improvement in the work process or the product.

Our Leadership

Bitfocus is a privately-owned corporation, built from the bottom up with grit, intelligence, and pride, which is reflected in the dedication of our Leadership Team. The scale of our Leadership Team allows us to bring both the wide breadth of expertise combined with the depth of experience required to ensure customer projects get done right. As a Clarity Human Services customer you tap into a network of specialized

talent and resources greater than any single community could support independently. Whatever the challenge, we have the knowledge, skills, and expertise to tackle it head-on. Bitfocus is a global and diverse company that believes all people should be treated with dignity and respect. Our core values reflect this by guiding how we treat others, how we conduct ourselves, and how we work together with each other, our partners, and our customers.

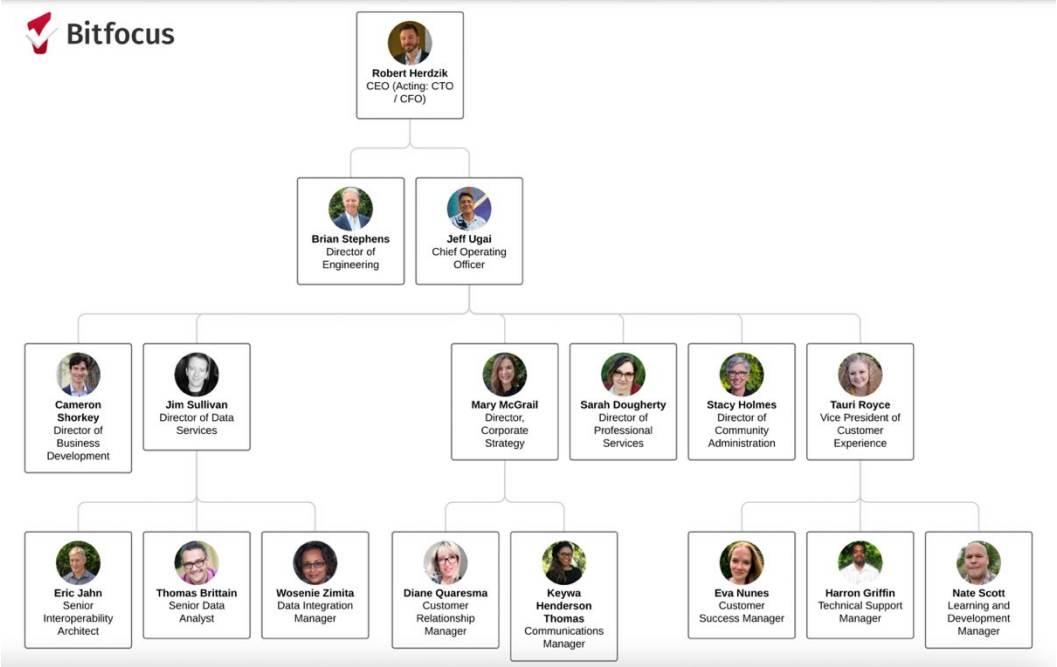
Our Future

As we look to the future, we are committed to carrying out our mission to enliven the Human Services space with data and technology that positively affects social change. Our agile, future-oriented mindset sets us apart from our competitors. We look forward to bringing new apps and technology, as well as new integration techniques to the HMIS realm.

Your Solution: A System That Meets Mecklenburg County's Needs

This proposal highlights the best features that Clarity Human Services has to offer: data quality management, system administrator customization power, advanced report building and dashboard capabilities, and coordinated entry functionality integrated within the system. Clarity Human Services also includes the Data Import Tool to enable greater import and export functionality, including for HUD VASH data--something many other Bitfocus communities have already done using Clarity. Beyond this, Clarity Human Services includes built-in APIs to make advanced integration projects possible. What makes Clarity Human Services the superior choice for HMIS is its ability to bring greater ease to the Mecklenburg County CoC's HMIS management and user experience as well as serve as a solid foundation for advanced reporting, dashboard, and integration projects. It's a single-system solution to meet Mecklenburg County's current needs as well as evolve with the continuum's growth and needs as they shift over time.

- **If applicable, identification of the proposed project team (including responsibilities).**



Proposed Contract Project Team
Our multidisciplinary team of implementation professionals knows what it takes to lead a major system transition, such as this, successfully. We've built and implemented several similar instances, and we know what it takes to get things right. As a Clarity Human Services customer, you tap into a network of specialized talent and resources with more skills and relevant experience than any community could support independently. Our team includes dedicated data analysts and engineers, certified project management professionals, former federal technical assistance providers, and certified privacy professionals. Whatever the challenge, we have the knowledge, skills, and expertise to tackle it head-on.

Dedicated Account Manager
Meet your new best friend at Bitfocus. Your account manager serves as a dedicated point of contact during implementation and beyond. Think of them as your Bitfocus concierge, Clarity expert, and customer advocate all rolled into one awesome person.

Implementation Advisors
You will be assigned designated technical advisors to the implementation who will ensure everything in the new instance of Clarity Human Services is configured just right. Data and engineer staff experts will carry out the data migration and data transformations. They offer support in reporting, data quality, data management, data visualization, and more. Your implementation staff will provide a highly targeted implementation approach and timeline to guarantee a successful onboarding of new or existing agencies to your Clarity Human Services installation.

Post-implementation, you'll have access to the Bitfocus team's staff experts for any advanced projects you may need to complete. We have subject matter experts who are dedicated to providing complex customizations and project planning. You'll benefit from their broad range of knowledge and skills through their consulting, analytical, and implementation support services. Additional fees may apply.

Training Specialists
We provide System Administrator and user Train-the-Trainer training sessions for the local admin team. Our dedicated learning management system (LMS) offers a full curriculum of on-demand lessons for ongoing training. The Bitfocus training development process (both pre- and post-implementation) emphasizes pedagogically sound instructional design rooted in Adult Learning Theory and continuous refinement and revision. Training modalities include in-person, video, and interactive web tutorials. As with everything at Bitfocus, training operations are data-driven; we track, measure, and monitor key learning activity elements to ensure you get the most out of all your training.

- **If you wish to add supplemental information, such as a Proposal Narrative or other information, please be sure the additional attachment(s) is labeled "Supplemental Information."**

All requested documents are included in the Supplemental Information attachment.

Section 3.3. [A] Statement of Work

- **Vendors must submit a Statement of Work to demonstrate competency in performing services as defined in this Solicitation.**

Statement of Work

Company Background and Experience

Bitfocus is honored by the opportunity to work with the Mecklenburg County CoC, its partner agencies, and funders. Purpose-built for homeless services, Clarity Human Services is the care coordination platform of choice for high-performing systems of care. We designed Clarity Human Services specifically to meet the needs of homeless housing and service providers. Quickly becoming the HMIS software of choice for the nation's highest-performing communities, Bitfocus proudly partners with most of the nation's largest cities, including Boston, Los Angeles, Denver, San Francisco, San Diego, Las Vegas, Seattle, and more.

Founded in Las Vegas, Nevada, we've helped government and human services organizations leverage technology to address homelessness since 2003. We begin our work administering a third-party HMIS application, MetSyS. Using this experience, we developed our own SaaS offering, Clarity Human Services, from the ground up in 2012, shaped according to our frontline experience as HMIS system administrators. Since then, the Clarity Human Services customer base has grown to include over 85 systems, including 68 CoCs across more than 40 implementations.

Built from the bottom up to serve the unique needs of homeless service and housing providers, Bitfocus is equipping communities with the technology and expertise needed to support closely integrated, high-performing systems of care. HMIS isn't a side project for us – it's the core of everything we do as an organization.

We also serve as the local system administrator for several of our largest HMIS implementations, and this frontline experience informs everything we do at Bitfocus. As system administrators ourselves, we have an innate understanding of the challenges of running a high-performance HMIS. We've got skin in the game and know firsthand the crucial role vendors play in empowering local admins and analysts. Our team includes dedicated data analysts and engineers, certified project management professionals, former federal technical assistance providers, and certified privacy professionals.

Our Core Mission

The entirety of our staff, comprising over 95 talented individuals, remains steadfastly focused on leveraging HMIS technology to advance homelessness solutions. Our policy and regulatory experience's depth and breadth inform everything we do at Bitfocus, and we hope you see that reflected throughout Clarity Human Services.

From the first string of code, we designed Clarity Human Services from the ground up to align both with HUD standards and the needs of high-performing continuums of care. As we develop Clarity Human Services and design system workflows, we take into central consideration HUD reporting and compliance. Front-end experience, both with our in-house community administration team and customer feedback, combined with our heavy involvement in HMIS Vendor Workgroup and industry events (e.g., NHSDC, NAEH) result in an experience-informed software that is best-of-breed for homeless services. We are deeply invested in the future of HMIS solutions.

Experience with System Implementation and Legacy Data Migration
Bitfocus recognizes the importance of first impressions, and we go out of our way to ensure new Clarity Human Services implementations get the best start possible. Bitfocus boasts a well-established track record of successful migrations from every major HMIS product, including dozens of transitions from WellSky - ServicePoint. Having migrated millions of client records from legacy systems to Clarity Human Services, we've been down this road before, and we know what it takes to get things right.

Moreover, we are committed to ensuring Clarity Human Services is an open, flexible, and secure platform for data integration with a variety of partners, stakeholders, and systems of care. Our Data Import and Data Analysis APIs provide a robust toolkit for programmatic access to the HMIS—without limits on frequency or volume. Furthermore, our standard agreements include contractual commitments to support the latest HUD CSV and XML schemas. System Administrators can use these formats to export or import data without the need for professional services or per-integration maintenance costs.

- **Include detailed description of the services to be completed along with sufficient information for the County to determine if the vendor meets each requirement.**

There are three primary service categories included within the scope of this RFP: initial onboarding, HMIS, and ongoing support.

Onboarding Services
As part of the initial onboarding services, Bitfocus walks you step-by-step through the implementation and data migration process. We've completed dozens of successful onboarding projects from ServicePoint to Clarity Human Service. We know what it takes to get the job done right, and you can rest assured that you will be in good hands with the Bitfocus team from day one.

Please refer to the General Implementation Gantt Chart + Narrative in the Supplemental Information for more detailed information on our initial onboarding process.

HMIS Platform
We provide a reliable and secure HMIS platform for 68 CoCs across more than 40 implementations, including 8 statewide implementations (Washington, Wisconsin, Nebraska, Nevada, Colorado, Rhode Island, New Hampshire, and Vermont). Clarity Human Services has a 99.99% uptime record and top-of-the-line features to maximize your HMIS usage and meet your community where they are. Coordinated entry system management, custom report and dashboard creation, easy system configuration, and advanced data integration capabilities are just a few of the ways Clarity Human Services stands head and shoulders above other industry vendors.

Ongoing Support
Every HMIS customer receives a designated account representative from Bitfocus (your Bitfocus Best Friend, or BFF, for short) who will be the system administrator's go-to contact throughout the duration of the contract. Your BFF will routinely check in to see

how things are going, keep tabs on open support tickets, and be available to help answer any questions.

System administrators also get access to our technical support team. Many of the Bitfocus technical support team members have previously been system administrators themselves or have worked in other human services roles. They are not just technical experts--they're HMIS experts. Customers love the Bitfocus technical support team, which is evidenced by its 98%+ satisfaction rating.

We also offer professional services for advanced projects that you may want additional support completing. Our staff experts routinely complete advanced projects with current customers such as custom report building, coordinated entry system redesign, and integration projects. Whatever the need, we're standing by ready to provide the support you need. A separate SOW may be required for these special projects.

- **Statement of Work must include an Activity-level implementation plan in Gantt chart format.**

Please see our Activity-Level Implementation plan with Gantt chart and narrative in the Supplemental Information.

Section 3.3. [B] 6.2 - Scope of Work: Specifications / Qualifications

a. Data Conversion Plan

- **The Vendor is expected to assist Mecklenburg County and the Charlotte-Mecklenburg CoC in conversion of electronic data to the new HMIS system as part of the data migration process.**

We implement Clarity Human Services under a customer success model, with our Professional Services teams training the local system administrators and guiding them through the configuration of their new system. Bitfocus will tailor our standard work plan to meet the priorities and logistical conditions of Mecklenburg County. As part of the implementation process, our Professional Services team will lead local Mecklenburg County system administrators through a system mapping exercise to understand the agencies, programs, and services that comprise your current WellSky implementation. Bitfocus has migrated dozens of continuums from legacy systems onto Clarity Human Services. Our team has a well-tested strategy in place to ensure a successful migration.

Our implementation plan ensures that system setup, training, and initial deployment are expeditious and effective. The exact timeline for software implementation will be determined once due diligence can be conducted with Mecklenburg County staff. The standard implementation period for Clarity Human Services is 4-6 months. Key variables/obstacles affecting the implementation schedule are: (1) the customer's ability to create and review export files for migration and (2) establishing new logistics and workflows between providers and the new system.

Migration Process
Bitfocus recognizes the importance of first impressions, and we go out of our way to ensure your new Clarity Human Services gets off to the best start possible. Having migrated millions of client records from legacy systems to Clarity Human Services, we've been down this road before, and we know what it takes to get things right. We're committed to ensuring that you wow your users from day one.

Data exchange formats

- If elements included are part of the HUD Data Standards, then these must be provided in a Comma Separated Values (CSV) file that fully conforms with the current version of the HUD HMIS CSV standards as published at: https://hudhdx.info/VendorResources.aspx.
- Any custom, non-HUD defined, elements are imported using a custom CSV Schema provided by Bitfocus

Sample Migration Timeline
A successful migration is dependent on accomplishing all of the milestones in a timely way, as well as continued communication throughout the process. As such, we recommend that the migration process span a fixed window of time.

Most migrations are completed in 4-6 months. That said, we recognize every community is different—some move a little faster, while others need a bit more time. We look forward to building a project plan that works best for Mecklenburg County.

For more information, please see the attached General Implementation Process: Gantt Chart + Narrative in the Supplemental Information.

- **Mecklenburg County will be responsible for data extraction from current systems, data scrubbing and data pre-processing, with assistance from the Vendor.**

Yes, once Mecklenburg County extracts its data from its current system and provides Bitfocus with an export of the legacy data to be imported into Clarity Human Services, we will provide robust assistance with data preparation and data migration. We will lead Mecklenburg County through an iterative process where we typically:

1. Review and provide an analysis of your data files using machine learning algorithms
2. Help you make informed decisions around data quality and clean-up
3. Consult with you as you clean up your data
4. After you provide us with newly cleaned files, we will then review those files and provide updated analysis and so on, until the data is ready for migration.

Please see the below answer and the General Implementation Process: Gantt Chart + Narrative in the Supplemental Information for more information.

- **The Vendor will be responsible for overall data conversation coordination, data conversation documentation, definition of required file layouts, and data import and validation into the new HMIS implementation. The Vendor is expected to conduct thorough quality assurance, conduct multiple trial runs, and provide a demonstration site prior to full migration to ensure the process is running as smoothly and efficiently as possible.**

Data services engineers from our team will carry out the data migration and data transformations and build out any necessary integrations. This team of experts offers support in reporting, data quality, data management, data visualization, and data visualization software. Truly exceptional in the industry, this is a powerhouse team of data experts. Our team members have decades of experience as Human Services data systems specialists, enabling them to tackle integration and data migration projects of any size or scope.

Once Bitfocus receives all data that needs to be migrated as part of the scope of this project, we will review these exports in-depth and provide you with a detailed report on any data quality issues we discover. Then, the data will be migrated to a dedicated testing site for your review. To facilitate testing, the migration site includes full reporting, data analysis, and direct database access functionality. Before the data is migrated to the live site, it undergoes a thorough testing process to ensure high data quality in the new system.

For more information, please see the General Implementation Process: Gantt Chart + Narrative in the Supplemental Information.

- **Describe the scope of report development tools and services and details on how the services will be provided. The Bidder should address the data availability for reporting (real time or delayed) and whether the reporting tool is a third-party tool integrated within the HMIS or Bidder-developed.**

Clarity Human Services Reporting Overview

Clarity Human Services empowers providers, policymakers, funders, and the community-at-large with actionable insights into the homeless response system's performance and outcomes.

Highly customizable data entry workflows and intuitive business intelligence tools make reporting at a client, project, and case manager level straightforward and accessible. Our reporting and database architecture provides opportunities for integration with mainstream systems of care, data warehouses, and agency-level case management systems for advanced needs.

Clarity Human Services includes several features that simplify the administration of programs/services with diverse reporting requirements and blended funding streams. So whether tracking outcomes for a federally-funded CoC program, a state-funded Housing Assistance Program (HAP) grantee, or a privately funded initiative, system administrators and agency managers are empowered with the tools required to customize and build upon the federal HMIS Data Standards to meet the requirements of virtually any funding source.

Nimble Data Entry Configuration
Flexible system configuration tools create the framework for powerful outcome reporting and analytics for various internal and external audiences. Programs in the system can be designed to support a wide variety of workflows and performance metrics. Individual goals, funding sources, eligibility requirements, contracts, automated service delivery, documentation requirements, and numerous other configuration options ensure that the program data collection is tightly tailored to each provider.

Administrators can set custom program performance targets based on HUD or custom data elements. Associated dashboards and reports can be pinned to users' start pages or distributed automatically via email (or other means).

Powerful Outcome Reporting and Analysis:
Clarity Human Services reporting and data analytics tools built directly into the application provide insight into your service ecosystem's operations and performance at the client, program, and system levels.

- **Pre-Built Reports:** Clarity Human Services has over 175 prebuilt reports in its Report Library and Data Analysis Tool—all of which offer drill-down functionality. Grouped by subject area, the Report Library covers a wide range of everyday reporting needs, including client lists, demographics, data quality, and program performance. A list of the reports included in the Clarity Human Services report library, including their full documentation, is available at https://help.bitfocus.com/the-report-library.
- **Data Analysis Tool:** The Clarity Human Service Data Analysis Tool provides robust custom reporting and data visualization tools directly integrated into the application. Built off a proven BI platform, Looker ©, the Data Analysis Tool delivers immediate access to client data in a highly configurable environment that supports custom fields, user-defined measures, and table calculations—without limitation to size, frequency, or date range. Using an intuitive drag-and-drop interface, users can quickly build, save, and share reports with fellow users. Most importantly, the Data Analysis tool is user-friendly, enabling authorized end-users to query necessary data on populations and extract information from form/assessment responses without advanced technical knowledge.
- **Data Model:** For advanced reporting and backup applications, Clarity Human Services supports direct access to a real-time replica of your client data, allowing you to run custom queries or connect third-party tools like Tableau® or PowerBI®.

Reporting in Clarity Human Services runs against live client data. To optimize performance, a handful of measures in the Data Analysis are cached. Details on each can be found here: https://help.bitfocus.com/data-refresh-rate.

Presenting Data to Stakeholders

- Custom Reports, Dashboards, and Exports: Authorized users can use the Data Analysis tool to create reports, dashboards, and exports—including support for custom fields.
- Public Dashboards: The public data model in our Data Analysis Tools allows analysts to confidently create public-facing embedded dashboards,

visualizations, reports, and queries while ensuring personally identifiable information will not be accessible from public-facing websites.

- Limited-Access Credentials (Keeping third-party stakeholders in the loop): Our Data Analysis Tool allows for the creation of user accounts that limit the scope of the information available for reporting and export, including restricting access to Personally Identifiable Information (PII). These limited scope accounts allow access by third-party organizations while strictly controlling what external entities can access information. For example, funder- or grant-level access accounts could allow third-party organizations to see the impact of their participation firsthand by providing direct access to interactive reporting in a secure and controlled manner that protects PPI.

Esri ArcGIS® Geospatial Analytics
Outreach and GIS functionality in Clarity Human Services runs off the industry-standard ArcGIS® platform. As an official Esri partner, we can help the continuum harness the power of location-aware analytics and integrations.

b. Report Development

- **Mecklenburg County expects that the Vendor will provide any and all HUD mandated reporting, including HUD's CoC APR, ESG CAPER, PIT, HIC, LSA, and SPM reports in compliance with HUD requirements.**

All current HUD and Federal partner HMIS reports are available in the Report Library, built to the published federal specifications. They are well-documented and are kept up-to-date and in full compliance with standards.

- **The awarded Vendor is expected to maintain ongoing compliance with current and future mandated HUD reporting requirements as such requirements change over time. This maintenance is expected to be provided to Mecklenburg County as part of the software maintenance agreement and at no extra cost.**

As system administrators ourselves, we use the same Clarity Human Services software as our customers. So, reviewing and incorporating required HUD data changes and functionality is vital to our operations, just as much as they are to yours! We cannot afford the risk of missing a HUD/Federal Partner deadline nor risk a report being non-compliant. This requirement augments our standard contractual guarantee of compliant, on-time reports.

Therefore, as we continue to enhance Clarity Human Services, HUD reporting and compliance are taken into central consideration when designing workflows within the system. Front-end experience, both with our in-house community administration team and customer feedback, combined with our heavy involvement in HMIS Vendor Workgroup and industry events (e.g., NHSDC, NAEH), results in experience-informed software that is best-of-breed for homeless services.

Clarity Human Services has pre-built program templates that come ready-to-go and fully equipped with all Program Descriptor Data Elements (as well as UDE's) for each program type--both HUD (CoC, ESG) and Federal Partner (PATH, VA, RHY,

HOPWA). These pre-built templates take the guesswork out of configuration and ensure compliance.

Additionally, the Clarity Human Services Report Library contains all the HUD-required and Federal partner reports, including PDDEs. These reports are kept updated and in full compliance with standards.

Bitfocus is fully committed to ongoing compliance with all HUD and federal partner regulations out of necessity, yes. But, beyond our own need for compliance, we also legally guarantee this compliance through contractual commitments in all of our standard agreements to maintain full compliance with current Data Standards, Programming Specifications, and other HMIS policies and regulations established by HUD and its federal partners.

- **The Vendor is expected to take the lead on developing all necessary reports as part of the system implementation. The Vendor is expected to engage Mecklenburg County in confirming the intended use of the needed reports, prior to developing them.**

The Clarity Human Services Report Library contains all the HUD-required and Federal partner reports, including PDDEs. These reports are kept updated and in full compliance with standards.

Though the County can build custom reports independently, if they want Bitfocus to do some advanced custom report-building for them, that can be arranged via a separate SOW.

- **Mecklenburg County also expects the Vendor to provide audit tools to enable HMIS System Administrator to investigate past user behavior/data changes.**

System Auditing – Full Audit Log Access

Clarity Human Services provides complete auditing records on all areas connected to user interaction. These include a log of all user interactions, tracking what information was changed, who changed it, and when. With Clarity, you can also monitor database deletions, changes, and modifications. For data privacy and security reasons, the audit trails are available only to users with a System Administrator user license and can be accessed using two methods:

- **Audit Log Link:** On every page, an audit log is presented at the bottom right of the screen, visible only to authorized users. The audit log displays any updates made to any of the data on the form. Items such as old value, new value, date/time of the update, and the user who made the update are all historically presented in a concise format.
- **Database:** The audit log is also provided through the relational database, allowing the system administrator to access the data using a query tool or write reports to manage the updates in any way the system administrator defines. Here are some other data we collect for security auditing purposes.
    - Login date of every user login to the system
    - Length of time a user has been logged in for each session

- History of all failed login attempts
- History of client information accessed by a user
- History of IP address(es) from which a user logged in/attempted to log in
- Reports run/accessed by a user

- **All reports will be designed and developed by the Vendor in a timely fashion with accompanying technical documentation which describes how the reports were developed. The Vendor is expected to perform quality assurance tests on all developed reports as confirmed by Mecklenburg County through a formalized acceptance process as part of the software implementation at no extra cost.**

All current HUD and Federal partner HMIS reports are available in the Report Library, built to the published federal specifications. They are well-documented and are kept up-to-date and in full compliance with standards. We allow plenty of time for User Acceptance Testing prior to the updated reports' release to live instances. As system administrators ourselves, we use the same Clarity Human Services software as our customers. We can neither afford the risk of missing a HUD/Federal Partner deadline nor afford the risk of a report being non-compliant.

- **Additionally, the Vendor is expected to provide HMIS staff with the necessary technical training on the tools used for ad-hoc report development, database schema and architecture, etc.**

Our online Learning Management System (LMS) includes a reporting training curriculum called Report Builder, which includes a set of resource courses to get your system administrators set up for reporting success. This curriculum covers topics such as Data Quality Reports, Looker/Data Analysis Models Overview, and the importance of clean data. This certification will cover general Clarity Human Services reporting how-tos for both the Report Library and Data Analysis Tool, but it is not training on how to be a data analyst or how to learn report building in general.

Report Documentation

Bitfocus offers extensive online report documentation, including data models and data dictionaries, for Clarity Human Services' 175+ pre-built reports in the Report Library and the ad hoc Data Analysis Tool for custom reporting. We aim each section at various audiences and consistently update the content in response to feature upgrades. Where relevant, these resources include sample reports, screen illustrations, and step-by-step instructions. Bitfocus also uses animated GIFs and videos for training, guaranteeing a pleasant and thorough learning experience.

Clarity Human Services includes an integrated, live Data Dictionary that provides easy reference to all system, HUD, and custom fields configured in the HMIS. Our data structure uses clear naming conventions and straightforward table structures. We also make a full Entity Resource Diagram (ERD) available to support custom reporting, data import and export, and local analysis.

Online Report Documentation
Support for Reporting provides the end-user with detailed information for each report in the library, including the source of each data point, as well as guidance on drill-down functionality and parameters.

Data Analysis Tool Reporting Documentation
The Bitfocus Data Services Team releases updates to the Clarity Human Services Data Analysis Tool, on average, 3-4 times per month. Oftentimes, a corresponding e-blast accompanies these updates, informing the system administrator of any important changes. There is also a section of the Clarity Help Center (help.bitfocus.com) dedicated to the Data Analysis Tool.

Clarity Human Services Data Model Documentation
The Clarity Human Services Help Center includes detailed documentation on the Customer Data Model, including the database schema and integrated functions available to advanced users. The Help Center also includes a downloadable Entity Relationship Diagram (ERD) and a full list of all the fields and tables for reporting and extraction purposes. In addition, the Clarity Human Services application itself includes a searchable list of all fields and picklist values, including custom fields.

Clarity Human Services Data Schema Documentation
Bitfocus provides documentation on each table in Clarity Human Services, including descriptions for each field, all keys, and sample SQL Queries of each table in practical use.

- **If customized reports are needed then it is expected that the Vendor will work with HMIS staff in confirming the intended use of the proposed modifications, prior to developing them. All custom programming and software modifications will be designed and developed by the Vendor accompanied by technical documentation describing the programming steps and how the modifications were developed. The Vendor is expected to perform quality assurance tests on all custom reports.**

Custom Reporting Assistance
In most cases, there will be no need for Bitfocus to build custom reports for Mecklenburg County. This is because authorized users will be able to use the Data Analysis Tool in Clarity Human Services to build their own custom reports and dashboards. The reporting interface is user-friendly, and our online help center (help.bitfocus.com) includes full reporting documentation.

System administrators also have access to the Bitfocus help desk with its technical support team, as well as their account representative (BFF)--all of whom will be able to offer advice on custom report building.

Still, we are always happy to assist if you need us to develop custom reports. Our professional services team is available and experienced in building custom reports and dashboards for customers. Additional fees apply and are determined through an SOW.

Feature updates, software modifications, and UAT

Clarity Human Services operates on a single code-base with updates released 5–6 times per year to introduce new features and maintain HUD compliance. We take every effort to test all code before release thoroughly. We use a combination of automated scans, live testing, and internal peer-review to evaluate release candidates.

All customizations in the system are maintained through the upgrade path. However, in instances of official changes to HUD Data Standards, our team will create the screens, forms, assessments, and reports necessary for you to remain compliant, and these will be added to the system as part of a system upgrade. We fully prepare and inform our customers of such changes well ahead of time, and leave the legacy screens, forms, and assessments available in the system post-upgrade.

From there, general patches, upgrades, and feature enhancements are deployed using our standard update process:

1. **Customer Notification**
   First, customers are notified via our email newsletter(s) and help center, including full documentation of any new features and functionality well in advance. We also host a webinar to demo most releases. All updates and instructions are robustly documented and stored in the Bitfocus Help Center library.
2. **Training Environment/User Testing**
   Next, updates are pushed to our customer training environments to allow users to use and test the changes before applying them to the production environment. This testing period typically lasts several weeks to ensure optimal adjustment.
3. **Production Launch**
   Finally, updates are pushed to production environments and available to end-users.

There is no downtime associated with most updates and no effort required on the system administrators' part. When necessary, sufficient notice is provided before downtime, and updates are pushed during non-business hours.

- **As part of proposal response, the Bidder should describe the scope of necessary custom programming and software modifications and the approach as to how these will be provided. Explain how such modifications and customization will affect future system enhancements and upgrades.**

Configuration Support and Training

Bitfocus will provide your organization with special support to ensure that your system is customized to meet your needs with maximum ease-of-use. We will provide training and empower your system administrators to feel confident in their abilities to autonomously configure the Clarity Human Services system to meet the continuum's needs, with minimal guidance from our support staff (although we are of course, always on standby for assistance).

- **Implementation Guidance:** Our implementation team will work with local administrators to provide expert guidance as they configure the system. This includes instruction on the completion of inventory spreadsheets of all programs and services within the Mecklenburg County HMIS, as well as instruction on

best practices for Clarity Human Services program/service nomenclature and categorization.

- **Agency System Configuration Guidance:** Bitfocus implementation staff will virtually meet system administrators to instruct them and help plan the configuration of their agencies into Clarity Human Services.
- **Program & Service Configuration Guidance:** Bitfocus implementation staff will instruct system administrators on proper Program and Service configuration for new or existing agencies to allow agencies to appropriately enter client data within their configuration.

By the end of the Implementation Training, your Administrative staff will feel fully confident in their ability to configure the system.

Robust Documentation
In addition to our hands-on support, our Clarity Human Services knowledge base provides comprehensive documentation, program-specific how-to guides, training videos, and other resources free of charge.

Maintaining Your Customizations
All customizations in the system are maintained through the upgrade path. The following customizations can be completed without affecting source code:

- Custom Fields and Forms: Authorized System Administrators can create new Custom Fields to support unique funding requirements and build upon the base HMIS Data Standards. Our drag-and-drop screen editor then makes it easy to build or customize data entry screens, including support for form validation, conditional display logic, and other advanced features.
- Custom Assessment Forms and Score Processors: System Administrators can customize any assessment or create custom scored assessments to match the unique needs and priorities of their communities.
- Service Types: Clarity Human Services allows for the full customization of services, including service types and categories.
- Eligibility Rules: Customizable program eligibility requirements categorize providers who are well-positioned to deliver the types of services best suited for the client, enabling accurate referral of clients whose needs are appropriate for each particular program.
- Workflows: The very customizability of Clarity Human Services allows the HMIS Lead to fully customize any workflow in the system. Customizable program templates are especially useful for this purpose, as they aid System Administrators in the consistent and efficient management of the unique data collection requirements of each program type.
- Funding Sources: Agency Managers can use the Funding Source tab to track primary and sub-granted funding sources and attach them to programs and services. This data can then be used to filter reports in the Report Library or included in queries and dashboards created with our Data Analysis tool.

- Custom Reports, Dashboards, and Exports: Authorized users can create their own reports, dashboards, and exports--including support for custom fields. Data can also be pulled via API or scheduled SFTP uploads.
- Access roles: In Clarity Human Services, administrators can manage user roles by creating and assigning access roles. The built-in Access Control List (ACL) model, provides granular level permissions to all areas of Clarity Human Services. Individual access roles are assigned to a user to dictate which areas of the system they can view, what they can read/write/edit/delete, and how those roles relate to agencies they are potentially sharing data with. Any areas of the system to which the user is denied access are eliminated from view, providing a seamless user experience on any access role.
- End User Administration Tools: Local administrators will have a full set of administration tools to manage clients, users, and providers, set rules, and configure the user experience. Sign-on security features in Clarity Human Services include precautions such as maximum password attempts, lockout time, force password change, and two-factor authentication.
- Data Sharing: System administrators can control how agencies share data, both between agencies and between agency departments. Data sharing is easy, reliable, and allows for integration between systems while providing high-security functions.

- **It is expected that information should only be entered once into the system. Modules within the system should be integrated such that manual or batch processes are not needed for information to flow throughout the system.**

The auto-cascade feature auto-populates data fields that have already been completed on previous enrollment or assessment forms. This saves time and improves data quality by removing the chance for data entry errors. System administrators can control how far back data should auto-populate and which screens and assessments allow for auto-population. Screens can auto-populate within a program, an agency, or across all agencies (if permitted by sharing rules). In cases where multiple assessments or program enrollments exist, data will cascade from the most recent.

- **The software should also allow for the locking down of client profiles and easy modifications to system sharing.**

Data Sharing

By default, Clarity Human Services enables system-wide sharing, meaning the client record can be shared with all agencies' staff members. However, custom sharing profiles can be created and assigned at the agency and department levels. There are four categories of settings that can be adjusted to control the way agencies share and view client data: Sharing Defaults, Sharing Groups, Agency Exceptions, and Departments.

Sharing Between Agencies

System administrators can allow agencies to share data uniformly with all other agencies using the **Sharing Default Group**. By default, all agencies are assigned to the Sharing Default group. If a system administrator wants to override the Sharing Default Group to share specific types of client data with another agency or groups of agencies in

specific, customizable ways, they can use the **Sharing Groups** feature. And even further, sometimes an agency will want to share data differently with one or more agencies within that Sharing Group; system administrators can use **Agency Exceptions** to accommodate this.

Sharing between programs and services within a specific agency
Agencies with multiple programs and/or services can use **Departmental Sharing** to secure each program and/or service independently. Any combination of departmental data restrictions can be assigned to users with departmental access, such as the ability to view program/service history, case notes, and client files within that program

Sharing data fields or certain portions of the client record
For more granular control, privacy flags on **sensitive data fields**, notes, files, or **entire client profiles** allow for excluding individual data elements of a specific client record from general sharing/access agreements.

- **Describe what integration/interface development services are required and how they will be provided.**

Based on our reading of the proposal, there are minimal integration and no interface development projects required as a part of the scope of this RFP. It seems like the scope of this RFP can be accomplished with Clarity's standard features. However, if the County's needs should evolve, we have the following features available for data import and integration projects.

Data Import and Integration
We are committed to ensuring Clarity Human Services is an open, flexible, and secure platform for data integration with various partners, stakeholders, and systems of care — including HMIS systems, AHCCCS, and many others. With decades of combined experience working with HMIS data, our Data Services team boasts a well-established track record of successful imports and integrations that span every major HMIS product. Having moved millions of client records from ServicePoint to Clarity Human Services, we've been down this road before, and we know what it takes to get things right.

Clarity Human Services offers multiple ways of importing and exporting both standard HUD HMIS and community-defined data elements. Options include:

- **HUD HMIS CSV/XML Formats:** Standard HUD HMIS CSV and XML exports with community-specific Coordinated Entry questions and responses are included out-of-the-box and continually updated to match federal specifications. Both formats can also be uploaded using theClarity Human Services Data Import Tool (DIT). The DIT consists of an optional user interface and customer-facing underlying RESTful API. Clarity HUD HMIS CSV/XML exports also have a HUD-specified option to encrypt any personal identifiers contained in the files to de-identify the exported data while maintaining the ability to match the encrypted (hashed) identifiers.

- **Custom Data Formats:** Custom data can be imported via the Data Import Tool (DIT); we extend the HUD XML schema to accommodate custom data elements

(beyond Coordinated Entry questions and responses). Users can also create custom exports using the Data Analysis Tool (our Looker BI environment) in various formats for one-time or scheduled export. The Data Analysis Tool supports direct exports to secure FTP (sFTP), Amazon S3, and other cloud hosting platforms.

Our Clarity Human Services APIs offer automated, schedulable access to data import and exports. Clarity Human Services includes two APIs that support integrations with other systems and applications. Both APIs utilize a RESTful architecture and are well-documented in our knowledge base.

1. **Data Import Tool (DIT) API:** Our DIT API allows for the import of all HUD HMIS data elements in the standard HMIS CSV and XML formats, including multiple projects, project types, funders, and well as custom Coordinated Entry questions and responses. Users can import custom community data elements in an extended HMIS XML format. Moreover, the DIT includes data quality, de-duplication features, and mapping assistance to ensure the data you're bringing into your system is reliable and located in the right place. Data quality of DIT imported data can be further analyzed using Clarity's canned reports and the Data Quality Looker analytics model. The DIT comes with a dedicated user-facing data migration administration website.
2. **Data Analysis API:** Our more flexible Data Analysis API allows for programmable, read-only access to the Looker business intelligence and ad hoc reporting tools built into Clarity Human Services. See https://help.bitfocus.com/introduction-to-the-data-analysis-tool-and-looker-resources. Analysts can access HMIS and custom data elements with these read-only APIs in near real time.

Two exciting new systems integration features are coming soon to Clarity Human Services: a custom flat-file ingestion mapping tool and a GraphQL-based API.

The custom flat-file ingestion mapping tool will let you map your custom spreadsheet or comma-separated data file to your existing Clarity database field locations. The custom flat-file ingestion mapping tool will then know exactly how to import your data into Clarity Human Services, greatly facilitating data onboarding. Your imported spreadsheet file doesn't have to be in the HUD HMIS file format. You can save the mapping for future reuse.

GraphQL-based API: GraphQL* is a cutting-edge real-time read/write API technology for getting and sending any specific records you want, sorted and filtered the way you want. GraphQL is popular with web app developers and is similar to SQL read/write access for the entire Clarity Human Services App. You will be able to use it for operational care coordination in your community or other authorized applications that your community desires. Initial GraphQL API functionality is scheduled for release in Q2, 2022, with expanded functionality to almost all aspects of the Clarity Human Services data set to follow.

*Please note that this feature's release is subject to change without notice.

- **Describe your project team's experience and system procedures in customizing automated and manual import/export utilities. Indicate whether this experience includes providing date specification and a transaction receipt. Additionally, describe the system procedures for automated and manual import/export utility.**

Our project team uses a standards-first approach to import and export routines, using flexibility within those standards to offer customer-specified modifications. Our team has decades of combined experience implementing API and bulk workflows for health and human services, including client consent, closed-loop referrals, Fast Healthcare Interoperability Resources (FHIR), and NIEM.gov standards. Please see the attached Key Leadership Staff Resumes for an overview of our team's experience.

Data Import Tool
The Data Import Tool (DIT) can import all HMIS data elements from a standard HMIS (CSV and/or XML) dataset, including multiple projects/project types/funders. Custom Data can also be imported via the Data Import Tool (DIT). We extend the HUD XML schema to accommodate custom data elements. When necessary, we've developed custom data specs for custom data imports/exports. Our export tools are extremely customizable for not only HUD formats, but also any locally defined formats/needs. The DIT also allows custom and automated imports via our XML DIT API.

Moreover, the DIT includes data quality, de-duplication features, and mapping assistance to ensure the data you're bringing into your system is reliable and located in the right place. The DIT has transaction receipts through the UI. These receipts include date specifications since they are part of the HUD specifications as well as Clarity Human Services' custom specifications. Data quality can be further analyzed using Clarity's canned reports and Data Quality Looker models. If you choose to add the DIT to your standard contract, the package will also come with a dedicated data migration site (update based on quote). Additional fees apply.

Scheduling and Automating Imports and Exports
We offer several ways to automate or schedule imports and exports of data via Clarity Human Services. Options include:

RESTful Data Import and Data Analysis APIs
Our Clarity Human Services and Clarity Human Services Data Analysis APIs offer programmatic access to data import and exports. Both APIs utilize a RESTful architecture and are well-documented in our knowledge base.

- **Clarity Human Services API**: Our Clarity Human Services API allows for the import and export of HUD HMIS XML and custom fields using a standard RESTful architecture.
- **Data Analysis API:** Our more flexible Data Analysis API allows for programmatic access to the business intelligence and ad-hoc reporting tools built into Clarity Human Services.

Customer-Defined Exports

- Authorized users can use our Data Analysis Tool to create automated exports (including regular SFTP uploads) of custom CSV schemas.
- Customer Data Model: Advanced users can use our Customer Data Model to script their own data pulls directly from their dataset.
- Professional Services: For advanced integrations, our Bitfocus staff experts can create a custom ETL solution. This is an excellent solution where complex business rules of unique use cases apply.

d. Training

- **The Bidder must list the nature, level, and amount of training to be provided in each of the following areas:**

i. End User training

There is no direct end user training provided, however, there is a provided Train-the-Trainer course that prepares system administrators to lead end user training in a live environment. Since most communities have their own unique configurations and processes, this train-the-trainer method generally works best.

ii. System Administrator training

We know how the system administration role keeps the gears in motion for the entire system. That's why we ensure all system administrators get the training they need. We will provide the entire Mecklenburg County system administration team with a full system administration training, as well as a train-the-trainer session to prepare the Mecklenburg County team to facilitate the General User Training in a live environment. There is no trainee limit for system administrators; an unlimited amount of system administrators can train concurrently.

iii. Standard Report utilization training

iv. Custom Report writing training

We just released a brand-new reporting training curriculum in the LMS called Report Builder, which includes a set of resource courses to get your system administrators set up for reporting success. This curriculum covers topics such as Data Quality Reports, Looker/Data Analysis Models Overview, and the importance of clean data. This certification will cover general Clarity Human Services reporting how-tos for both the Report Library and Data Analysis Tool, but it is not training on how to be a data analyst or how to learn report building in general.

v. Technical training (e.g. programing, operations, etc.)

Training on system configuration will be covered as a part of the System Administration training course.

Just like its design, the training for Clarity Human Services is also rooted in the user experience. Our Learning and Development team partners with our own system administrators to create in-depth content that will ensure your system administrators will get the most out of our powerful software. The Bitfocus training development process (both pre-and post-implementation) emphasizes pedagogically sound

instructional design rooted in Adult Learning Theory and continuous refinement and revision.

The standard Clarity Human Services On-demand training package is powered by our Learning Management System (LMS), which includes a comprehensive library of training courses and materials in addition to the System Administrator Training and the Train-the-Trainer training. System administrators get 6 months of unlimited access to the LMS. Beyond that, access is granted on a subscription basis, or courses can be purchased individually. Please see https://learn.bitfocus.com/ for more information. If more training support is needed, Bitfocus offers various training packages for additional fees. Packages include live, remote training, or live in-person training. Since Mecklenburg County has expressed a desire for live in-person training, you will see this included on the attached Price Quote in the Supplemental Information.

- **Describe the scope of system documentation, the related services and the approach as to how these services will be provided. Please also describe any online help capabilities available within the system.**

Help Center
Our online Help Center (help.bitfocus.com) includes comprehensive documentation of the Clarity Human Services interface, as well as program-specific how-to guides and other resources that the right information is available when you need it. **A large portion of the help center is dedicated to system administrators to guide them through the creation of workflows in ways that optimize accuracy, completeness, and timeliness, as well as comply with your local policies and procedures.**

In addition, we have a robust array of report documentation. Bitfocus offers extensive online report documentation for Clarity Human Services' prebuilt Report Library and the ad hoc Data Analysis Tool. We aim each section at various audiences and consistently update the content in response to feature upgrades. Where relevant, these resources include sample reports, screen illustrations, and step-by-step instructions. Bitfocus also uses animated GIFs and videos for training, guaranteeing a pleasant and thorough learning experience.

- Online Canned Report Documentation: Support for Reporting provides the user with detailed information for each report in the library, including the source of each data point and guidance on drill-down functionality and parameters.
- Data Analysis Tool Reporting Documentation: The Bitfocus Data Services Team releases updates to the Clarity Human Services ad hoc Data Analysis Tool, on average, 3-4 times per month. Oftentimes, a corresponding email accompanies these updates, informing the system administrator of any important changes. There is also a section of the Help Center dedicated to the Data AnalysisTool.
- Clarity Human Services Data Model Documentation: The Clarity Human Services Help Center includes detailed documentation on the Customer Data Model, including the database schema and integrated functions available to advanced users. The Help Center also includes a downloadable Entity Relationship Diagram (ERD) and a full list of all the fields and tables for reporting and extraction purposes. In addition, the Clarity Human Services

application itself includes a searchable list of all fields and picklist values, including custom fields.

- Clarity Human Services Data Schema Documentation: Bitfocus provides documentation on each table in Clarity Human Services, including descriptions for each field, all keys, and sample SQL Queries of each table in practical use.

In-system Help Widget
Help Center articles can be accessed directly from the Clarity Human Services application using our built-in help widget. The widget suggests relevant articles and resources based on the user's role and current page.

Our support widget also provides system administrators in-application access to our help desk, including the ability to submit a ticket or start a live chat with an HMIS expert.

e. HMIS Hosting

- **Mecklenburg County anticipates licensing and maintaining ownership for all hardware, software, other technologies, and overall technical environment necessary to support the requirements defined within this RFP. Mecklenburg County also anticipates that it will retain the custodianship of all data generated through use of the HMIS.**

You own your client data. We do not share client or account information with outside parties without prior written permission.

- **The Vendor is expected to host the HMIS for the Charlotte-Mecklenburg County CoC. The Vendor is expected to provide a series of services designed to support the hosted environment and provide a proactive maintenance and management approach to the IT environment.**

Included in this list of expected services are the following:

i. Periodic data backups performed, tested, and scored.

Clarity Human Services is a Software as a Service (SaaS) offering, with Bitfocus providing hosting, support, and maintenance of the system as part of the contract. Bitfocus staff is fully responsible for troubleshooting and investigating the system, as well as the timely resolution of technical and performance maintenance issues.

Regular backups and disaster recovery services are included with the SaaS offering, and backups are retained for up to 11 months. We use a secured AWS S3 bucket for backup storage. By default, all Clarity Human Services traffic is 2,048 bit SSL encrypted at transit and at rest. All API traffic must be further AES encrypted.

ii. Software version and patch updates and standard maintenance procedures coordinated, applied, and performed for the HMIS application, server, operating system, and other required system components.

iii. Database monitoring and performance tuning.

Bitfocus has a well-coordinated process for deploying system upgrades, patch release timing, content, communication, and testing. The Clarity Human Services application is updated to enable clients to master the ever-changing terrain of human services. Feature

updates to the Clarity Human Services application are a continuous and ongoing process. Feature updates are released 5–6 times per year to meet both general end-user needs and also to maintain HUD compliance. We make every effort to thoroughly test all new applications and report code using a rigorous quality assurance process before it is considered for release. We use a combination of automated scans, live testing, and internal peer review before release. Issues reported to our help desk our promptly escalated and evaluated by our development and reporting teams.

General patches, upgrades, and feature enhancements are deployed using our standard update process:

1. **Customer Notification**: First, customers are notified via our email newsletter(s) and help center, including full documentation of any new features and functionality.
2. **Training Environment/User Testing**: Next, updates are pushed to our customer training environments to give users an opportunity to use and test the changes before they are applied to the production environment.
3. **Production Launch**: Finally, updates are pushed to production environments and available to end-users.

There is no downtime associated with the majority of updates, and no effort is required of the system administrators. Sufficient notice is provided if downtime should occur, however. The development and refinement of Clarity Human Services SaaS software always include user research & UX design, user testing, and agile development. All standard product upgrades are included in licensing costs; no additional fees apply unless a scope of work is agreed upon by both parties for requested customizations or professional services.)

iv. Design, implementation, maintenance and monitoring of all components needed for HUD security and compliance with Mecklenburg County IT Security & Compliance policy.

Bitfocus takes a proactive approach to regulatory compliance and implementation of national best practices and industry standards. Our staff draws from well-established policy and regulatory expertise and includes former HUD technical assistance providers, attorneys, and privacy experts. We regularly present at national conferences and events, such as the National Human Services Data Consortium (NHSDC).

As renowned thought leaders in the HMIS field, our efforts extend beyond just compliance to actual *proactive engagement* in the national conversation around HMIS and homeless policy generally. Our staff is among the most active participants in the HUD Vendor Workgroup, and we are quick to seize any opportunity to participate in the development of future regulations and national best practices. We have found that actively engaging with HUD around any proposed changes in the data standards or regulations as early in the process as possible is the best approach to ensuring policy implementations that are mutually successful for all stakeholders. In our role as the System Administrator for some of our largest customers, we participate actively at both a community and federal level in following and establishing national best practices for HMIS lead agencies and continuums of care. In the same way, we will be able to work with the local IT team to ensure the configuration of their Clarity Human Services system matches the needs of the Mecklenburg County Security & Compliance Policy.

v. Disaster recovery services.

Bitfocus has a full Disaster Recovery Plan with chains of authority established and responsibilities for each team. A copy of the plan is available upon request.

vi. Any other services necessary to the successfully provide server/application hosting that meets Mecklenburg County functional requirements as described within this RFP.

None.

vii. Periodic reporting to Mecklenburg County on server management issues, activities performed and service levels provided.

All system updates for Clarity Human Services occur automatically. Therefore, scheduled outages or system disruptions are highly atypical. If such occurrences do happen, however, then the HMIS Lead is notified well in advance and is continuously updated until the issue is identified/resolved. We provide regular reports on service outcomes to the County. We also maintain a status page (status.bitfocus.com), where users can verify system availability and view a history of planned and unplanned outages. Administrators may subscribe for updates and notifications of status updates.

- **Describe how the HMIS will be hosted and the services provided as part of the hosting agreement. The Bidder should indicate if the hosting will be performed by the Vendor or by a Sub-contractor. If the Bidder chooses to subcontract with a data center then describe if your company or firm has limitations to using data centers to host the HMIS.**

Providing high-performing data homelessness data systems—including hosting, infrastructure, information security, maintenance, support—has been our mission since day one. Since the launch of Clarity Human Services in 2012, we have provided these services directly to a growing portfolio of jurisdictions ranging in size from Guam and the Northern Mariana Islands to our ~5,000 user system in Los Angeles, including users working in multiple agencies. Our 99.99%+ uptime record demonstrates the resilience of our system architecture and service protocols.

Clarity Human Services is a web-based application that can be securely accessed from any desktop or mobile device that supports the latest version of any major web browser. We designed our Clarity Human Services Software with a modularized component structure that allows us to support a robust suite of data integration and analytical tools while ensuring a highly-scalable, fault-tolerant SaaS application.

We operate on a cloud infrastructure hosted by Amazon Web Services (AWS). Bitfocus does not rely on any 3rd parties or subcontractors for professional services. **Our data center is ranked as Tier III and Class A and holds the following certifications: SSAE 16 and ISAE 3402 Service Organization Control (SOC) 1 Type II, SOC Type II and SOC 3 reports; and is compliant with the PCI DSS, HIPAA, ITAR, and NIST 800-53 frameworks. Security measures are in place to isolate data from any other instance of the application/database hosted on the same server.**

- **Please include any standard Service Level Agreements that your organization would recommend in a Vendor hosted HMIS.**

Please see our standard contract document in the Supplemental Information.

f. User Licensing Environment

- **Mecklenburg County anticipates using the most cost-effective licensing model, across the Continuum of Care. If a Bidder is proposing multiple licensing options (i.e., enterprise and named user), then please provide a complete copy of the pricing forms for each option clearly labeled as such.**

Clarity Human Services is licensed as a SaaS product, with a named-license structure. For Mecklenburg County pricing, please see the Pricing Form and the attached price quote in the Supplemental Information.

Initial Payment and Initiation of Services Startup activities will be initiated upon receipt of the initial payment and fully executed Agreement.

- Start-up Fees Fees required for the initiation of services include advance payment of Fixed Charges for three ("3") months of services and standard setup fees for each of the user licenses and Services in the Agreement. Bitfocus must receive startup fees before startup activities will be initiated.
- Implementation and Data Migration fees for initial onboarding services--including configuration, data migration, and training packages--are due in full at contract execution.

On-going Monthly Costs We license Clarity Human Services through a subscription-based, Software as a Service (SaaS) model. After initial one-time implementation and data migration services, the following ongoing services supportMecklenburg County throughout the life of the contract.

- User Licensing: Access for a specified number of named System Administrator, Manager, and Enterprise end users to your instance of Clarity Human Services. Access to the Data Analysis Tool for custom reporting and dashboard creation functions as a separate add-on license that can be assigned to any user license regardless of the license type.
- Data Analysis Licensing: Access for a specified number of licensed Clarity Human Services users to the standalone and/or embedded versions of the Data Analysis Tool. There are two levels of data analysis licenses: 1) Embedded, which allows in-system access to custom reporting and prebuilt dashboard, and 2) Standalone, which allows in-system as well as external Looker© system access to custom reporting, as well as the ability to create custom dashboards.
- Agency Licensing: Support for the configuration of a specified number of agencies within the system.
- Platform Fee: This is a flat fee that provides access to the full Clarity Human Services platform. It includes all system modules (minus the Data Import Tool, which is an additional cost) as well as all system maintenance, updates, new feature releases, and disaster recovery at no additional charge.
- Training Site: Access to a dedicated training environment for the instance.

Accommodations can be made for annual or quarterly payments. We routinely come up with flexible payment plans to meet customer needs.

g. Data Elements

i. Limitless transfer of data across systems, both exporting and importing data using current XML and CSV schema specified on the HUD Exchange website

We place no limits on the use of the HUD CSV/XML export and import functionality in the application: You can run as many HUD CSV or XML reports from the Report Library as necessary at any time. Also, as an additional import option, the Data Import Tool (DIT) allows for the import of HUD data as well as custom data in HUD XML schema (additional fees apply for the DIT).

ii. Software designed to collect and report HMIS data elements as specified on the HUD Exchange website

Clarity Human Services is a unified software, purpose-built for HMIS. Therefore, HUD reporting and compliance are taken into central consideration when designing workflows within the system.

Clarity Human Services has pre-built program templates that come ready-to-go and fully equipped with all Program Descriptor Data Elements (as well as UDEs) for each program type--both HUD (CoC, ESG) and Federal Partner (PATH, VA, RHY, HOPWA)/. These pre-built templates take the guesswork out of configuration and ensure compliance. Built-in form logic, including conditional logic and validation checks, help ensure that data collection is as accurate and complete. Communities often adjust these templates to meet their local priorities by copying the templates, then customizing them with custom fields and forms to match their workflow.

Additionally, the Clarity Human Services Report Library contains all the HUD-required and Federal partner reports, which include PDDEs. These reports are well-documented, and are kept updated and in full compliance with standards. Depending on the access role, users can generate and submit these reports on-demand and with almost no processing time.

iii. Collect and report HMIS data elements in a secure, widely accessible, and easily manipulated environment

Clarity Human Services includes pre-built program templates that take the guesswork out of configuration and cover the data collection and reporting requirements for each HUD and federal partner program type. This helps ensure that all required Universal and Program Specific Data Elements (as well as PDDEs and MEs) are collected fully and accurately. All HUD-required and Federal partner reports are available in the Report Library.

Program templates can be created and then applied to various types of programs. The customizable program templates aid system administrators in the consistent and efficient management of each program type's unique data collection requirements. System Administrators can duplicate these templates at the click of a button and customize them to meet local priorities using the drag-drop field editor and screen designer.

System Administrators have access to numerous pre-built data quality reports that track common data quality issues. For a more detailed examination of program data quality,

administrators can use the data quality model in Clarity Human Services' Data Analysis Tool.

Easy Updates to System Functionality
Customizability is the name of the game in Clarity Human Services. As the CoC and local service providers' needs shift over time, we know that you need a system that you can configure to shift along with you as you continue to improve system-wide homeless service interventions.

Our drag-and-drop screen editor then makes it easy to customize data entry screens or build them from scratch, including support for form validation, conditional display logic, and other advanced features. In Clarity Human Services, you can create custom fields, screens, forms, and assessments—complete with conditional display logic and the ability to add up to three levels of display constraints on a single field. For example, you could build out custom program templates to ensure that all required information is collected upon program/project enrollment. Program templates can be created and then applied to various types of programs. Customizable program templates aid system administrators in consistently and efficiently managing each program type's unique data collection requirements.

Use the custom reporting tools in Clarity Human Service to track specific data points, identify trends, and track the performance of your system over time. Harness the power of your data to inform you, lead to strategy adjustments, and direct the ongoing customization of your system. As local policies change or as you gain fresh insights from querying the data within the data environment, you are bound to discover ways to customize and improve the functionality of your Clarity Human Services system.

iv. Integrated coordinated assessment and referral module

An End-to-End Coordinated Entry Solution
An effective Coordinated Entry system is the cornerstone of a community's collective response to homelessness. Bitfocus has developed, and continues to refine, a versatile set of tools to assess, refer, and connect individuals and families with housing resources to accommodate the new coordinated entry data standards and the variety of ways communities have implemented coordinated entry. We designed these tools to be flexible enough to use with the most common coordinated entry processes as well as local custom tools and best practices. Clarity Human Services is an end-to-end solution for coordinated entry. **For us, coordinated entry wasn't an add-on module or an afterthought. We built Clarity Human Services upon the very concept of coordinated entry assessment and referral. Thus, the system provides the underlying structure that CoCs need to generate CE reports with clients ranked by vulnerability score, as well as the ability to generate by-name lists by special population, and much more.**

As HMIS system administrators ourselves, Bitfocus is an active member of the HUD HMIS System Administrator calls. Our boots-on-the-ground knowledge ensures that Clarity Human Services is fully adaptable to all HUD-recommended coordinated entry configurations while remaining in compliance with the coordinated entry data standards.

Assessment
The VI-SPDAT and other OrgCode assessments come prebuilt into the system, and they are kept updated by our staff. System assessments like the VI-SPDAT can be duplicated and customized as needed to meet community-specific requirements, and there is also the option to build custom assessments entirely from scratch--including developing your own custom assessment scoring processors.

Referral
Clarity Human Services allows for both manual referrals, as well as automated referrals based on customizable requirements. Clarity Human Services includes everything required to determine eligibility at both the client and project levels. Our assessments (custom or standard), tracked characteristics feature, program eligibility engine, and other reports and tools do quick work determining a client's eligibility as they go through the assessment process. From the project level, the Eligibility Engine automates program eligibility screening and aids housing navigators in quickly identifying eligible clients for particular programs.

Maximize Outreach
Clarity Human Services gives the provider relevant and direct access to the HMIS tools they need as close as possible to that first client engagement and bring the client as quickly as possible into the coordinated entry system.

Mobile capabilities: Go paperless with the ability to capture signatures, photographs, and locations in the field. Built off the industry-standard ArcGIS® platform, Clarity Human Services includes support for geographic information and has geospatial analysis built-in. Our Location and Outreach features offer location-centered navigation for service providers, while our custom location fields and location-aware services provide geographic context to the homelessness data collected in HMIS.

Facilitate Engagement
Clarity Human Services supports a progressive engagement model. Start with what you have and, over time, develop the relationship and the client record. Track service transactions without a complete client record. Overlay maps, integrate outside data sources to set the stage for client engagement, and direct outreach teams to areas of most intense need.

Powerful Assessment and Referral

- Locally configurable prioritization tools and automatic eligibility screening

Customizable and stackable score processors: System Administrators can either use pre-existing score processors or create their own according to their local priorities to assign custom scoring to fields and sections of Assessments.

- **Case Conferencing:** Referral-specific case notes, a full referral history, and automated eligibility screening facilitate secure collaboration between housing navigators and provide an ideal platform for case conferencing.
- **Customizable Waitlists and Dashboards:** Communities can customize Coordinated Entry waitlists and create custom dashboards that combine assessment scores with other data elements (including support for custom fields).

- **Real-Time Inventory Management and Reservations:** Understand current and anticipated availability with real-time bed and unit inventory management--including support for reservations to prevent duplicate referrals to the same resource.
- **Secure storage of documents:** the Referral section allows documentation of client-specific attributes such as subpopulation type, ADA needs, etc. Documentation-ready status can then be fully automated by the system and can even be used as a program eligibility factor. Once the system detects that a client record contains all the required documents for a specific program, it will label the client as 'document ready,' thus alerting the navigator that this client is ready for placement. And for case conferencing, referral-specific case notes, a full referral history, and automated eligibility screening facilitate secure collaboration between housing navigators and provide an ideal platform for case conferencing.
- **Referral Notifications:** These customizable referral notification alerts can be automatically delivered either via in-app message and/or external email (without client PII) upon referral. Or, for more advanced applications, our API can be used to power notifications via third-party providers such as Twilio.
- **Nimble Referral fields:** Provider End Users are able to reject a referral with a documented reason with a simple dropdown menu

Prioritization: Go beyond the by-name list with housing ladders
In addition to a primary customizable prioritization tool, Clarity Human Services allows for multiple waitlists to facilitate complex referrals and transfers within the queue for situations with acuity drops (e.g., someone goes from PSH to TSH). Here are some ways you can use multiple queues to free up resources (and secure funding):

1. Create a primary queue for basic coordinated entry
2. Create a secondary queue for those who are enrolled in high-intensity/high-cost services, with the ability to step them down in service intensity (to TSH, section 8, etc.) and free up the PSH units.

Fully compliant with the Coordinated Entry Data Standards
Each community approaches coordinated entry a little differently. That's why Bitfocus has designed coordinated entry tools to be flexible enough to use with the most common coordinated entry processes as well as local custom tools and best practices. Your community will simply need to determine its coordinated entry workflow, and then Clarity Human Services can do the rest.

- Pre-built project templates that include screens containing the HUD universal CES data elements
- Assessments dedicated to Current Living Situation
- Coordinated Entry-specific screens that include data fields that track assessment location and contact type
- Pre-built services designed to track Coordinated Entry Event categories
- Inferred values to eliminate the need for duplicate data entry

Tracking CES Placements and Tracking CES Performance
Clarity Human Services has numerous ways to monitor CES activities in the system, with special emphasis on reporting for the VI-SPDAT.

Client-level Scores
At the client level, all coordinated entry assessments, including the VI-SPDAT, are readily available for review from several areas of the client record, including the Assessment History and Client Tab section of a client record.

Pre-Built Reports
Clarity Human Services has several pre-built CES reports that provide client-level CES Assessment details, including demographic information in addition to such referral-specific as assessment sub-scores and days pending on the community waitlist.

Data Analysis Tool
The Coordinated Entry Model provides the following features and information centered around client assessments (custom and VI-SPDAT) and referrals:

- Pre-built Table Calculations
- Custom Fields
- Custom Filters
- Pre-built Dashboards and Visualization Options

(We designed this model specifically for monitoring coordinated entry and CES Assessment information.)

Aggregate-level Scores
Pre-Built Reports
In addition to client-level reporting, the Clarity Human Services report library includes sundry aggregate reports that provide insight into the performance and outcomes of coordinated entry at the system, agency, and program levels.

Data Analysis Tool
Likewise, the Data Analysis Tool makes quick work of aggregate-level coordinated entry reporting, including support for funder and publicly accessible dashboards that provide insight into system performance while preventing access to sensitive Personally Identifiable Information (PII).

v. Conform to and adhere to and stay updated with HUD requirements in an ongoing way

Yes. We have consistently delivered updates to official data elements, response categories, data collection screens, and report specifications on or before the published HUD deadlines.

h. User Interface

i. Consistency in the user interface and functionality - buttons, terms, functionality, placement, movement, transitions all look and work the same from any point of entry

User interfaces are clean, modern, and easy to use. The system is consistent in the user interface, and functionality: buttons, terms, functions, placement, movement, and transitions look and work the same from any point of entry. The use of common UI elements makes the end-user feel more comfortable and enables them to complete tasks quickly and efficiently. A consistent pattern in language, layout, and design throughout the application means that once a user masters a task, they can transfer that skill to other parts of the software.

ii. An intuitive user experience is provided: information is requested only once and auto- populated to other screens; information is derived or inferred from other responses where possible and logical to avoid duplication or data incongruence; data quality auditing and management tools are accessible and easily manipulated

The auto-cascade feature auto-populates data fields that have already been completed on previous enrollment or assessment forms. This saves time and improves data quality by removing the chance for data entry errors. System administrators can control how far back data should auto-populate and which screens and assessments allow for auto-population. Screens can auto-populate within a program, an agency, or across all agencies (if permitted by sharing rules). In cases where multiple assessments or program enrollments exist, data will cascade from the most recent.

iii. Thorough instruction on the proper use and set up of software solution to optimize reporting accuracy and timeliness; train-the-trainer capacity

We know how the system administration role keeps the gears in motion for the entire system. That's why we ensure all system administrators get the training they need. We will provide the entire Mecklenburg County system administration team with a full system administration training, as well as a train-the-trainer session to prepare the Mecklenburg County team to facilitate the General User Training in a live environment. There is no trainee limit for system administrators; an unlimited amount of system administrators can train concurrently.

Just like its design, the training for Clarity Human Services is also rooted in the user experience. Our Learning and Development team partners with our own system administrators to create in-depth content that will ensure your system administrators will get the most out of our powerful software. The Bitfocus training development process (both pre-and post-implementation) emphasizes pedagogically sound instructional design rooted in Adult Learning Theory and continuous refinement and revision. The standard Clarity Human Services On-demand training package is powered by our Learning Management System (LMS), which includes a comprehensive library of training courses and materials in addition to the System Administrator Training and the Train-the-Trainer training. Please see https://learn.bitfocus.com/ for more information.

If more training support is needed, Bitfocus offers various training packages for additional fees. Packages include live, remote training, or live in-person training.

iv. Thorough and continually updated user interface documentation, including all parts of system from system administration to front-end use to data integration; every screen is documented in a clear and cohesive manner

Our online Help Center (help.bitfocus.com) includes comprehensive documentation of the Clarity Human Services interface, as well as program-specific how-to guides and other resources that the right information is available when you need it. **A large portion of the help center is dedicated to system administrators to guide them through the creation of workflows in ways that optimize accuracy, completeness, and timeliness, as well as comply with your local policies and procedures.**

In addition, we have a robust array of report documentation. Bitfocus offers extensive online report documentation for Clarity Human Services' prebuilt Report Library and the ad hoc Data Analysis Tool. We aim each section at various audiences and consistently update the content in response to feature upgrades. Where relevant, these resources include sample reports, screen illustrations, and step-by-step instructions. Bitfocus also uses animated GIFs and videos for training, guaranteeing a pleasant and thorough learning experience.

- Online Canned Report Documentation: Support for Reporting provides the user with detailed information for each report in the library, including the source of each data point and guidance on drill-down functionality and parameters.
- Data Analysis Tool Reporting Documentation: The Bitfocus Data Services Team releases updates to the Clarity Human Services ad hoc Data Analysis Tool, on average, 3-4 times per month. Oftentimes, a corresponding email accompanies these updates, informing the system administrator of any important changes. There is also a section of the Help Center dedicated to the Data Analysis Tool.
- Clarity Human Services Data Model Documentation: The Clarity Human Services Help Center includes detailed documentation on the Customer Data Model, including the database schema and integrated functions available to advanced users. The Help Center also includes a downloadable Entity Relationship Diagram (ERD) and a full list of all the fields and tables for reporting and extraction purposes. In addition, the Clarity Human Services application itself includes a searchable list of all fields and picklist values, including custom fields.
- Clarity Human Services Data Schema Documentation: Bitfocus provides documentation on each table in Clarity Human Services, including descriptions for each field, all keys, and sample SQL Queries of each table in practical use.

i. Reporting

i. Solution includes an integrated immediate, extensive, supported, infinitely configurable, easy- to-use and unlimited-by-size-or-frequency-of-query reporting tool

Data Analysis and Visualization

Clarity Human Services features an ad-hoc Data Analysis Tool that allows for easy drag-drop manipulation of variables into beautiful dashboards and custom reports, enabling you to present data in a digestible, understandable format to funders and other stakeholders. With this tool, the data presentation possibilities are endless and, more importantly, accessible: fields can be selected, filtered, joined, and dragged-dropped, including built-in calculations based on the HUD HMIS universe-based dataset. All data elements in the Clarity Human Services system (including custom fields) can be translated to this tool, making it possible to report on service data from all possible angles.

The data analysis tool offers the following in terms of data visualization options:

1. Cartesian Charts
    - Column Chart
    - Bar Chart
    - Scatterplot Chart
    - Line Chart
    - Area Chart

2. Pie and Donut Charts
    - Pie Chart
    - Donut Multiple Chart

3. Progression Charts
    - Funnel Chart
    - Timeline Chart

4. Text and Tables
    - Single Value Chart
    - Single Record Chart
    - Table Chart

5. Maps
    - Map Chart
    - Static Map (Regions) Chart

- Status Map (Points) Chart

Public-facing dashboards and embeddable visualizations
Maximize the visibility of key performance indicators with the public data model. The public data model in our Data Analysis Tool allows analysts to confidently create public-facing dashboards, reports, and queries while ensuring personally identifiable information will not be accessible from public-facing websites.

Custom Reporting
The Clarity Human Services Data Analysis Tool gives analysts access to query both HUD and custom data elements, build and save custom calculations, and create custom reports and dashboards. Queries are easy to build, save, and modify.

Third-Party Visualization Systems
For advanced reporting and backup applications, Clarity Human Services supports direct VPN access to a real-time replica of your client data, allowing you to run custom queries or connect third-party tools like Tableau®.

ii. Queries of the entire database are easy to build, save, and modify including provision of the necessary table joins.

Our Data Analysis Tool allows authorized users to query the full client dataset, including custom fields. Queries are easy to build, save, and modify. Our Customer Data Model provides direct access to a real-time replica of client data for more advanced applications. Moreover, users can export data using numerous formats.

iii. Available tables and fields for inclusion in queries is unrestrained; access is granted to all tables for use in reporting and documentation and customer support is maintained

The Customer Data Model includes access to all HUD and custom fields in the database. Full documentation, including an Entity Relationship Diagram (ERD) is available.

iv. Thorough and continually updated report documentation (including data models and data dictionaries, and table joins that is able to tell us a) what information a canned report contains and b) from where in the database the data comes from which report and c) why the report was created (what purpose did it purport to serve)

The Clarity Human Services help center includes full report documentation.

v. Ability to manage unidentified client data to ensure counts of services provided are query able at state and local levels

Yes, you can report accurately on service counts, even for unidentified clients. Unidentified client information is still queryable and counted in the system since it is still associated with unique client IDs. This is possible for both prebuilt Report Library reports as well as custom reports. The Report Library contains built-in filters to allow you to filter reporting results by CoC, agency, or program. The Data Analysis Tool

allows you to create unique geographic constraints so you can report on specific data within a specific region.

Clarity Human Services offers a couple of ways to lock down client profiles. One way is to mark the profile as "Consent Refused." For clients who don't want their personal information stored in the system, the system can auto-fill the Name, DOB, and SSN fields with default responses. To read more about this feature, please go to: https://help.bitfocus.com/consent-refused. The other method is to click the privacy shield icon within the client profile. This is for cases in which the client data is permitted to be visible to authorized users in one agency, but not other agencies.

vi. Ability to de-duplicate clients and households across programs, agencies, counties, continua, regions, and state as well as giving customers the ability to manage duplications for quality assurance; de-duplication process is monitored for quality assurance

Preventing Duplicate Clients

The Clarity Human Services interface is clean, modern, easy to use, and clear of unnecessary elements. Users enjoy a consistent pattern in language, layout, and design throughout the application. A Master Client Index identifies client records based on a unique identifier. A background script checks for duplicate records on profile creation, and if a record already exists, the system will prompt the end-user to open the existing record instead of creating a new duplicate record.

Clarity Human Services has built-in controls to minimize data duplication and incongruence, and no pre-configuration is necessary by the HMIS Lead. The system automatically detects duplicate criteria and prompts the end-user to open the existing record instead of creating a new duplicate record. Each Clarity Human Services installation has a Master Client Index, and the system identifies client records based on a unique identifier that is assigned at record creation. The system then uses a background script to check for duplicate records on profile creation and link these records through the common unique identifier. In addition to flagging and preventing duplicate records, this allows system administrators to maintain privacy and sharing obligations while providing deduplicated client counts for system-level reporting.

In the event a duplicate client slips through the cracks, system administrators can easily merge duplicate client records and even merge duplicate program enrollments (i.e., integrate program enrollments for family members who were enrolled individually by mistake).

Reporting on Duplicates

Authorized users can run reports to identify duplicate records. Clarity Human Service has an agency-based report that is intended for Agency Managers, who do not have access to system-level data for security purposes. In this case, to ensure de-duplication across agencies, Clarity Human Services includes automatic matching functionality that identifies duplicate records across agencies (regardless of sharing settings) and links them via a common, hidden General ID. This allows authorized users to produce de-duplicated, aggregate-level reports across the system while maintaining client privacy obligations.

System administrators can use the Data Quality Model in the Data Analysis Tool to search for duplicates system-wide and duplicates between agencies. Remember, however, that the system automatically detects duplicate records at record creation, as well.

vii. Detailed report of each aggregate analysis/report is standard practice as part of report development

Clarity Human Services has over 175 pre-built reports available in its Report Library and ad hoc Data Analysis tool—all of which offer drill-down functionality to help ensure the data is valid. **These tools and reports allow communities to analyze aggregate data grouped by subject area, such as by program, by client, or by staff case load.** Combined, they cover a wide range of common reporting needs, including client lists, demographics, data quality, and program performance.

viii. Easy-to-manipulate visual presentation software is available for customer use

Yes, please see item i. above for more information.

j. Customer Service

i. User Acceptance Testing (UAT) procedures around every software upgrade, patch release, feature enhancement delivery (including customized reporting) and other system change. Acceptable procedures include, at a minimum, a two-week UAT period

We follow both internal Quality Assurance and User Acceptance Testing (UAT) procedures for every application upgrade, patch release, and feature enhancement delivery (including customized reporting). Acceptable procedures include, at a minimum, a two-week UAT period. All UAT is conducted in the training environments prior to release to the production site, allowing the end-users to test the new features prior to release.

ii. Technical support services to ensure ongoing bug fixes and feature enhancements exists; integrated ticket system for customer ticket creation

Our standard Service Level Agreement (SLA) provides direct technical support access for system administrator users via a ticketing system, as well as timely bug fixes and system enhancements. Standard software fixes, upgrades, and patch releases are available at no charge to all Clarity Human Services instances.

Feature Enhancements, Issues, Errors, and System Bugs

Issue Tracking and Response

We use a ticketing system to track requests, with each request receiving a unique Ticket Number to track the issue through resolutions. Authorized users can view the status and full history of all support tickets for their community.

Bug Notifications

System administrators will be alerted to all bug fixes and provided with documentation before changes or within **2 hours** via email and our online Help Center.

Technical Support Ticketing and Response Time
System Administrators can reach our HMIS data experts via phone, email, chat, or even directly from the Clarity Human Services application. Regardless of how you reach out, each request receives a unique ticket number from our helpdesk platform to track the issue through resolution. We boast an average response time of fewer than 30 minutes and complete resolution in under an hour and a half.

More than your average help desk, our seasoned team of human services experts includes former HMIS system administrators, CoC and program staff, and other homeless services professionals with direct experience using and administering HMIS in the field.

Standard support hours are from 8 AM to 8 PM ET, Monday through Friday. Unless specific arrangements are made, after-hours and weekend support will not be available. These calls may require contacting an on-call representative who will assist you or make arrangements to provide needed assistance. An after-hours contingency plan can be arranged through a support agreement.

iii. Bidder operates a customer support team with specific performance requirements: time limits on outstanding tickets; spec-to-production quality assurance protocols; continual improvement for customer experience based upon ongoing analysis of current experience

Yes, please see item ii above for more information.

iv. Patch release timing, content, communication, customer testing, and customer acceptance are well coordinated

Clarity Human Services operates on a single code-base with updates released 5–6 times per year to introduce new features and maintain HUD compliance. We take every effort to test all code before release thoroughly. We use a combination of automated scans, live testing, and internal peer-review to evaluate release candidates.

All customizations in the system are maintained through the upgrade path. However, in instances of official changes to HUD Data Standards, our Professional Services Team will create the screens, forms, assessments, and reports necessary for you to remain compliant, and these will be added to the system as part of a system upgrade. We fully prepare and inform our customers of such changes well ahead of time, and leave the legacy screens, forms, and assessments available in the system post-upgrade.

From there, general patches, upgrades, and feature enhancements are deployed using our standard update process:

1. **Customer Notification**
   First, customers are notified via our email newsletter(s) and help center, including full documentation of any new features and functionality well in advance. We also host a webinar to demo most releases.

2. **Training Environment/User Testing**
   Next, updates are pushed to our customer training environments to allow users to use and test the changes before applying to the production environment. This

testing period typically lasts several weeks to ensure optimal adjustment.

3. **Production Launch**
   Finally, updates are pushed to production environments and available to end-users.

There is no downtime associated with most updates and no effort required on the system administrators' part. When necessary, sufficient notice is provided before downtime, and updates are pushed during non-business hours.

k. System Administration

i. Supported and compatible infrastructure for the length of the contract: whole architecture, development framework, server side and client side; more than just compatible, the expectation is that it is analogous to purchasing an out of the box product from Best Buy in that it is purchased

Clarity Human Services is a highly-configurable, Off-the-Shelf (OTS) HMIS application sold through a subscription-like Software as a Service (SaaS) model. Bitfocus is responsible for all ongoing architecture, hosting, and maintenance costs. Clarity Human Services does not require custom development before installation. Purpose-built for HMIS, it is a best-of-breed product that meets HUD and Federal partner requirements out-of-the-box and will integrate with most existing infrastructures and security products. Clarity Human Services includes the full set of data elements, entry screens, and federal reports required to remain compliant with both HUD (CoC, ESG) and Federal Partner (PATH, VA, RHY, HOPWA) HMIS requirements. Included program templates take the guesswork out of configuration and ensure accurate and timely collection of all required Universal and Program Specific Data Elements.

ii. Integrated Online Help functionality

Help Center articles can be accessed directly from the Clarity Human Services application using our built-in help widget. The widget suggests relevant articles and resources based on the user's role and current page. Our support widget also provides system administrators with in-application access to our help desk, including the ability to submit a ticket or start a live chat with an HMIS expert.

iii. 100% auditing of every field: changes made to records, date stamped and reportable, who made the change, and the original value vs the changed value; must be able to reverse changes

Clarity Human Services provides complete auditing records on all areas connected to user interaction. These include a log of all user interactions, tracking what information was changed, who changed it, and when. With Clarity, you can also monitor database deletions, changes, and modifications. For data privacy and security reasons, the audit trails are available only to users with a System Administrator user license and can be accessed using two methods:

- **Audit Log Link:** On every page, an audit log is presented at the bottom right of the screen, visible only to authorized users. The audit log displays any updates made to any of the data on the form. Items such as old value, new value,

date/time of the update, and the user who made the update are all historically presented in a concise format.

- **Database:** The audit log is also provided through the relational database, allowing the system administrator to access the data using a query tool or write reports to manage the updates in any way the system administrator defines. Here are some other data we collect for security auditing purposes.
    - Login date of every user login to the system
    - Length of time a user has been logged in for each session
    - History of all failed login attempts
    - History of client information accessed by a user
    - History of IP address(es) from which a user logged in/attempted to log in
    - Reports run/accessed by a user
- **Auditing reports:** Clarity also includes numerous reports in our report library that enable administrators to monitor and audit user activity, including:
    - User Activity Report - Displays the system activity of selected staff members. This report will provide information regarding login dates, times, and durations.
    - User Active Caseload - This report details the current caseload for a user and the activities.
    - Staff Client Data Activity Report - Provided a record of Staff/User client record activity in Clarity Human Services. The report is sorted by Staff/User and shows the Date/Time user activity on a client's occurred. It also includes the history of staff deleting records such as profiles, enrollments, services, etc.
    - User Client Note Hours Tracked - Provides an overview of the client note hours that users tracked. The hours also include a drill-down to details the clients and notes tracked.

iv. Adequate fund-source management; local, state, and federal dollars must be tracked to services provided to clients to ensure accurate reporting to all interested parties

Track custom funding sources for each project. From the front user's perspective, Clarity Human Services is simple, sleek, responsive, and tailored to their workflow application. From the back-end, we harness a very sophisticated and feature-packed feature set, which gives system administrators the **ability to configure their programs and projects in a multitude of financial/budget allocation models**. This includes the ability to map various and multiple funder contracts to a single program. Funding sources can be reported independently through our canned Report Library or our Data Analysis Tool. So, whether tracking outcomes for a federally-funded CoC program, a state-funded Housing Assistance Program (HAP) grantee, or a privately funded initiative, system administrators and agency managers are empowered with the tools required to customize and build upon the federal HMIS Data Standards to meet the requirements of virtually any funding source. **Key features include:**

- **Custom Fields and Forms**: Authorized System Administrators can create new Custom Fields to support unique funding requirements and build upon the base HMIS Data Standards. Our drag-and-drop screen editor then makes it easy to build or customize data entry screens, including support for form validation, conditional display logic, and other advanced features.
- **Program Templates**: Customizable program templates aid System Administrators in the consistent and efficient management of each program's unique data collection requirements and funder type.
- **Custom Reports, Dashboards, and Exports**: Authorized users can create their own reports, dashboards, and exports, including support for custom fields. Data can also be pulled via API or scheduled SFTP uploads.
- **Service-Based Funding**: Clarity Human Services also supports the ability to tie service items to a funding source and track service-related expenses against a running balance of available funds.
- **Funding Sources:** Agency Managers can use the Funding Source tab to track primary and subgranted funding sources and attach them to programs and services. This data can then be used to filter reports in the Report Library or included in queries and dashboards created with our Data Analysis Tool.

v. Integrated and accessible system administration tools: ideal functionality for the work system administrators

Clarity Human Services System Administration

Supporting Project Operations and Oversight

Clarity Human Services is the industry-leading software that allows you to effortlessly coordinate housing and services within your community, so you can concentrate on what matters most. We designed our HMIS to empower system administrators with incredible insight into what's happening in their system, both technically and functionally. Arguably, system administrators have more autonomy with Clarity Human Services than with any other HMIS on the market. This is due in large part to Clarity Human Services' extensive configuration capability -- it is autonomously customizable, meaning that system administrators (and agency managers, to some extent) have the capacity to configure the system themselves with minimal reliance on the Bitfocus technical support team or data services team. We are, of course, standing by to assist, but we guarantee that your authorized users will be pleasantly surprised (and excited!) over how easy the system is to configure.

Generally speaking, System Administrators have the ability to control the following:

- The type of data going into the system (both how the data is collected and the quality of the data)
- Who accesses the data, and that user's experience within the system
- The data coming out of the system in the form of exports, reporting, or data analysis

1. Control over the type of data going into the system

How Data is Collected

System administrators can use the customizability features in Clarity Human Services to configure the system to ensure that the data being collected is actually tracking the desired outcomes. In other words, they can mold the system to the 'shape' they need to match local priorities.

- **Custom Fields, Screens, and Forms:** Authorized users can create new customizable screens and fields using the drag-and-drop screen editor. These custom fields and forms can be created to support unique funding requirements and can be further specified at the system or agency level. The screen editor supports form validation, conditional display logic, and other advanced features. It's also possible to create copies of any screen or form and remove any unnecessary fields for program-specific data capture. Data validation and display constraints control data access, allowing authorized users to create fields that are required at the system, agency, and user levels.
- **Program Templates:** Customizable program templates aid users in the consistent and efficient gathering of unique data elements of each program type.
- **Custom Assessments and Score Processors:** System Administrators can customize any standard assessment or create custom-scored assessments to match the unique needs and priorities of their communities.

How Data Quality is Ensured and Measured

Out of the box, Clarity Human Services is designed to ensure data quality by controlling data quality as it's being entered into the system and by providing the tools administrators and managers need to analyze data quality. Data Entry Controls Clarity Human Services includes built-in data validation checks into template screens wherever possible to ensure high-quality data entry in full compliance with the CSBG requirements. System administrators can employ data validation and conditional logic when building their own forms or customizing existing screens. System administrators can also create tooltip text for any custom field. This feature is meant to serve as a guide for completing the field. For example, when completing an intake, a user can mouse over the 'Residence Prior to Program Entry' data field and a textbox will appear stating that this data field should document where the client slept the night before they entered their program. Data Quality Reporting Authorized users (based on license type, see below) will have the ability to analyze data quality from multiple angles using both canned reports and the Clarity Human Services Data Analysis Tool.

- **Canned Reports:** System administrators and other users have access to Clarity Human Services' extensive Report Library, which includes over 175 canned reports. The Monthly Staff Report, which can be automatically emailed to designated recipients, provides three categories of information:
    - User Activity (including the number of clients, [both existing and new] that each staff member worked with during the timeframe of the report)
    - Data quality by data element (e.g. Date of Birth, Race, Ethnicity, Veteran Status, etc.) for all clients served
    - Additionally, all canned reports included in our standard Report Library allow drill-down functionality, allowing users to view reports that identify missing/don't know/refused responses on data fields.

- Data Analysis Tool: The Data Quality Model, which is available using the Clarity Human Services Data Analysis Tool, immediately reflects changes in Clarity Human Services; any corrections made to the data will be automatically updated in Looker in real-time. The Data Quality Model yields the following data element values for all client (static demographic) fields.

2. Control who accesses the data and their experience with the system

Control who accesses the data

- **Access Roles:** Customizable access roles can be created and assigned to individual staff members or groups of staff members. When you assign an Access Role to a staff member or group, you are designating which information and capabilities they will have access to in your system. This includes reporting access; The Access Role-based reporting feature allows the System Administrator to regulate access to reports by designating which access roles will be allowed to access each report.

Control the End User experience

- **Custom Navigation Profiles:** The Navigation Profiles feature will allow you to control the visibility and order arrangement of the various tabs within your system. Once configured, the Navigation Profile can then be assigned to an agency.
- **Custom User Dashboards:** Agency Managers can use our Data Analysis Tool to create custom dashboards and reports and assign them to individual staff members—helping each user better understand their objectives and impact.

3. Control over the data coming out of the system

- **Customizable public-facing dashboards and embeddable visualizations:** The public data model in our Data Analysis Tools allows analysts to confidently create public-facing dashboards, reports, and queries while ensuring personally identifiable information will not be accessible from public-facing websites.
- **Custom Reporting:** The Clarity Human Services Data Analysis Tools give analysts access to query both HUD and custom data elements, build and save custom calculations, and create custom reports and dashboards.
- **Scheduled report emails:** On a weekly or monthly basis, our canned “Emailed Reports” can be automatically sent in PDF form to a recipient list of primary contacts or program managers at each participating agency. These reports provide data quality scoring data elements down to the user/staff level.
- **Scheduled data analysis reports:** We also provide similar functionality for our Data Analysis Tool and ad-hoc reports. It is possible to schedule automated email updates with beautiful pdf reports populated with dashboards, graphs, and charts. These emails can be finely tailored to meet the needs of the community. For example, the system can be configured to send an automated email report only if there has been a change in the data.

vi. Local System Administrators have access to all the functionalities needed to conduct daily operations

Easy Updates to System Functionality

Customizability is the name of the game in Clarity Human Services. As the CoC and local service providers' needs shift over time, we know that you need a system that your local system administrators can configure to shift along with you as you continue to improve systemwide homeless service interventions.

Our drag-and-drop screen editor then makes it easy to customize data entry screens or build them from scratch, including support for form validation, conditional display logic, and other advanced features. In Clarity Human Services, you can create custom fields, screens, forms, and assessments—complete with conditional display logic and the ability to add up to three levels of display constraints on a single field. For example, you could build out custom program templates to ensure that all required information is collected upon program/project enrollment. Program templates can be created and then applied to various types of programs. Customizable program templates aid system administrators in consistently and efficiently managing each program type's unique data collection requirements.

Use the custom reporting tools in Clarity Human Service to track specific data points, identify trends, and track the performance of your system over time. Harness the power of your data to inform you, lead to strategy adjustments, and direct the ongoing customization of your system. As local policies change or as you gain fresh insights from querying the data within the data environment, you are bound to discover ways to customize and improve the functionality of your Clarity Human Services system.

Section 3.3. [C] 6.3 - Scope of Work: Deliverables (service levels, reporting, milestones, etc.)

a. Milestones

i. HMIS must be fully implemented, tested and operational by a “go-live-date” of July 1, 2023.

Bitfocus recognizes the importance of first impressions, and we go out of our way to ensure your new Clarity Human Services gets off to the best start possible. Bitfocus boasts a well-established track record of successful migrations from every major HMIS product, including dozens of transitions from ServicePoint. Having migrated millions of client records from legacy WellSky systems to Clarity Human Services, we've been down this road before, and we know what it takes to get things right.

The exact timeline for software implementation will be determined once due diligence can be conducted withMecklenburg County staff. The standard implementation period for Clarity Human Services is 4-6 months. Key variables/obstacles affecting the implementation schedule are: (1) the customer's ability to create and review export files for migration and (2) establishing new logistics and workflows between providers and the new system.

b. Service Levels

i. Technical Support: Technical support will be available via telephone and email Monday – Friday, 8:00 AM EST through 5:00 PM EST with a preference for afterhours availability to accommodate programs that operate 24/7.

Technical Support for System Administrators

We staff our help desk with experienced CoC and HMIS experts ready to assist users via email, phone, or chat. Plus, our users love us, with our Help Desk averaging a 98%+ satisfaction rating. The Bitfocus Technical Support Team is industry-renowned for its excellence in customer care. This team is a unique collection of seasoned customer support experts that have an average of 8 years of customer support experience and have experience in the human services industry. Many have worked as caseworkers, case managers, and even system administrators. They know the unique challenges that your users face and are eager to provide customized solutions. We offer end-to-end support from a variety of angles to make sure that your system administrators and their end-users are comfortable--and even savvy--users of Clarity Human Services.

- **Technical Support**. Our standard customer support hours are from 8 AM to 8 PM, Eastern Time, Monday through Friday. In the event that after-hours support is required, we can establish an SLA to cover after-hours support. We also operate an extensively automated infrastructure monitoring system, which ensures that the platform's environment is always operational and available. Our engineering team is immediately notified if an issue does arise, which further ensures that emergencies are minimized.
- **Dedicated Account Manager**. In addition to our standard help desk and training resources, each community is assigned a single point of contact with our Customer Success team. Your Bitfocus Best Friend acts as your community's personal advocate and guide to many resources and services available to Clarity Human Services customers. They'll keep a tab on your system, and support tickets, and proactively check in throughout the duration of the contract to make sure you're getting the most out of your Clarity Human Services implementation.
- **System Documentation.** The Clarity Human Services Help Center (help.bitfocus.com) includes full documentation, how-to guides, videos, and other resources to help communities maximize the return on their investment. This site also offers additional technical documentation, including a data dictionary, data schema, and custom reporting guidance.

ii. Uptime: It is expected the HMIS will have an uptime percentage equal to or greater than 99.0%.

Bitfocus knows that the success of any HMIS depends on the system's ability to make data available while ensuring the data remains secure, confidential, and only accessible by authorized users. We're able to maintain 99.99% uptime while maintaining industry best practices for data security and encryption.

We designed our Clarity Human Services Software with a modularized component structure, ensuring a highly-scalable, fault-tolerant SaaS application. Its cloud-based infrastructure runs on the AWS cloud, taking advantage of the High Availability system

it offers. Built-in automated alerts notify Bitfocus engineers of any system outages so that they can respond promptly. There is minimal downtime with Clarity Human Services, as it is built from single code, and all updates are pushed via the cloud infrastructure. On average, **users enjoy 99.9%+ uptime** with their Clarity Human Services installations. Bitfocus maintains a status page, which links to a historical uptime page that allows you to browse past service issues (status.bitfocus.com/uptime).

iii. Patches: Patches must be tested and implemented within 24 hours of release.

For incidents such as bugs that require patches, the release or resolution times vary depending on severity. Critical fixes happen within 24 hours and blocker issues are fixed the same day.

c. Reporting

- **See SOW Section 6.2.J Reporting, all reporting capabilities will be available by the "go-live- date".**

Yes, all reporting capabilities will be available by the go-live date. They come as a standard component of the system and do not require a separate implementation.

Section 3.4 Insurance

- **Insurance Policy**

Please see our insurance policy in the Supplemental Information.

Section 3.5 Permits and/or Licenses, if applicable

- **Permits/Licenses**

Please see our business license in the Supplemental Information.

Section 3.6 Audited Financial Statement, if applicable

- **Financial Statement**

Please see the following page.

Form B. Pricing Worksheet

Regardless of exceptions taken, Companies shall provide pricing based on the requirements and terms set forth in this RFP. Pricing must be all-inclusive and cover every aspect of the Project. Cost must be in United States dollars. **If there are additional costs associated with the Services, please add to this chart. Your Price Proposal must reflect all costs for which the County will be responsible.**

For purposes of this Solicitation, assume an initial term of three (3) years, with the County having an option to renew for two (2) additional consecutive one (1) year terms thereafter.

1. Provide a cost analysis & detail (not to exceed 300 words)

The prices included below are an estimate of your licensing needs, based on the information provided in the RFP. We are happy to discuss any changes you need to make to the license count. Moreover, we don't want finances to be a barrier to Mecklenburg's transition and are willing to discuss different pricing options that will work for your budget.

We license Clarity through a subscription-based, Software as a Service (SaaS) model, named-user license structure.

- User Licensing: Access for a specified number of named System Administrator and Enterprise end users to your instance of Clarity Human Services. We charge a one-time setup fee for each of the licenses at the onset of the system use. We apply bulk discounts to the user licenses.
- Data Analysis Licensing: Access for a specified number of licensed Clarity Human Services users to the standalone and/or embedded versions of the Data Analysis Tool. There are two levels of data analysis licenses: 1) Embedded, which allows in-system access to custom reporting and prebuilt dashboard, and 2) Standalone, which allows in-system as well as external Looker© system access to custom reporting.
- Agency Licensing: Support for the configuration of a specified number of agencies within the system.
- Platform Fee: This flat fee provides access to the Clarity Human Services platform. It includes all system modules (minus the Data Import Tool, which is an additional cost) as well as all system maintenance, updates, new feature releases, and disaster recovery at no additional charge.
- Our implementation and data migration support package includes guidance with planning and coordination with your team. We implement Clarity under a customer success model, with our teams training the local administrators and guiding them through configuration. A dedicated Project Manager will create a project plan and conversion strategy to ensure a successful transition.

2. Analysis of Annual Costs

Overall Summary of All Annual Costs:	$136,920
Average Cost Per All Minimum Services	$20,160 (price reflects smallest available instance. Includes 15 user-license-access to HMIS)
Count of Minimum Services Priced in Proposal	1
Average Cost Per Priced Service	$20,160 (price reflects smallest available instance. Includes 15 user-license-access to HMIS)

3. Provide an all-inclusive annual rate for the proposed services.

Service	**Proposed Cost**		
HMIS Services	Year 1	Year 2	Year 3
	$247,570	$136,920	$136,920

4. Provide hourly billing rates for key personnel that may be needed to complete additional services not included in the Scope of Services.

Job Title/Labor Category	**Hourly Rate**

Professional Services	N/A. We offer professional services on a per project basis through pre-defined scopes of work.

Good/Service	Amount	Estimated Costs per unit, hour, etc.	Total Cost
Platform License: Clarity Human Services Community Edition. *Features unlimited program/project support, agency management, customizable fields, and Coordinated Entry functionality. This version supports multiple Continuums of Care (CoC) or multiple agencies/organizations.*	1	$ 7,200/year	$ 7,200/year
Administrator Users	3	$ 1,800/license/year	$5,400/year
Enterprise Users	288	$ 360/license/year	$103,680/year
Agency Licenses. *Each organization with distinct programs and services requires an Agency license.*	30	$ 120/license/year	$3,600/year
Advanced Data Analysis License (Standalone User). *Allows for advanced business intelligence queries and exports.*	3	$ 1,200/license/year	$3,600
Standard Data Analysis License (Embedded User). *Allows for easy data mining and data analysis using intuitive drag-drop functionality -- right from Clarity's interface.*	27	$ 120/license/year	$3,240
Training Site License. *A private Clarity training site. This provides a separate environment for training purposes.*	1	$ 3,000/year	$3,000
Data Import Tool (DIT). *Allows for importing HUD XML and CSV files into the Clarity Human Services platform. Supports the import*	1	$7,200/year	$7,200/year

of custom XML-schema files, as well. *Allows you to import data - e.g., HUD VASH data.*			
License Activation: Administrator	3	$300/license (one-time fee)	$450 (after 50% discount)
License Activation: Enterprise	288	$175/license (one-time fee)	$25,200 (after 50% discount)
On-Demand Training Access for Licensed System Administrators (6-Months). *Access to the entire Bitfocus LMS training library, including System Administrator, Agency Management, General Training, and End-User Train-the-Trainer training sessions.*	1	$1,500 one-time fee	$0.00 (after 100% discount)
Standard Implementation Support. *Implementation support package. Includes guidance with planning, configurations, and coordination with the data migration (if applicable) and training teams.*	1	$20,000 one-time fee	$20,000
Data Migration from Legacy System.	1	$40,000 one-time fee	$40,000
Optional: Live Training - System Administration and Data Analysis (in-person). *Local venue and equipment not included. In-person sessions will include training for: System Administration, Data Analysis, and End-User Train-the-Trainer for the local admin team.*	1	$25,000 one-time fee	$25,000
		Sum:	**$247,570**

Additional Comments: We also offer live online training if in-person training is not required. Options include:

- Clarity Connect User Conference (3 days): Clarity Connect brings together Bitfocus customers from across the country for educational workshops, guest plenary sessions, learning labs, and more. ($500/ticket. Usual price $1,000/ticket).
- System Administration (Online) Live online sessions. Modules include: System Administrator, Agency Management, General Training, and End-User Train-the-Trainer training sessions. ($4,000)
- Data Analysis (Online) Live online sessions. Includes extensive training to maximize the use of your Clarity Human Services data analysis tools. ($4,000)