HSH RFP #140 Contract Lifecycle Management System (CLMS)

Preproposal Conference

June 20, 2023

Agenda

- Introductions

- Overview of RFP and Submission Requirements

- Break

- Review Questions and Answers
  - Please submit questions in the chat

RFP Summary

- The intent of this RFP is to invite Proposals from qualified suppliers (Proposers/Applicants) of a Contract Lifecycle Management System (CLMS) whose proposed solution meets or exceeds current HSH requirements and will allow HSH to continue to leverage this solution well into the future as the needs of HSH grow and evolve.

- Contract awarded shall have an original term of five years. The City at its sole, absolute discretion, shall have the option to extend the term for three additional five-year terms, for a total of twenty years.

Schedule

RFP Issued	Tuesday, June 13, 2023
[Preproposal Conference](#)	Tuesday, June 20, 2023 10:00am-11:00am
Deadline for Written Questions	Tuesday, June 27, 2023
Answers and Clarifications Published	Tuesday, July 11, 2023
Deadline to Submit Proposals	**Tuesday, August 8, 2023 by 2:00pm**
Oral Presentation/Interview	Monday-Wednesday, September 18-20, 2023
Intent to Award Notification	September 2023
Agreement Commence	January 1, 2024

Limitation on Communications and Contact

Limitation on Communications

🔑 From the date this solicitation is issued until the date the competitive process of this solicitation is completed (either by cancelation or award), Proposers and their subcontractors, vendors, representatives and/or other parties under Proposer's control, shall communicate solely with the Contact whose name appears in this Proposal. Any attempt to communicate with any party other than the Contact whose name appears in this Proposal, including any City official, representative or employee, is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol does not apply to communications with the City regarding business that is unrelated to this Proposal.

Contact: Latasha Bellamy| HSHProcurements@sfgov.org

Applicants

- HSH seeks a qualified Proposer who can demonstrate organizational, functional, and technical capabilities, as well as the experience, expertise, and qualifications necessary to provide and support a fully integrated and proven solution to include both implementation and ongoing maintenance and support.

- HSH shall award one contract to the Proposer that meets the Minimum Qualifications of this Solicitation and whose Proposal receives the highest-ranking scores. Proposers may subcontract any portion of the work included in each service component, but HSH will only enter into agreement with the prime/lead contractor.

Anticipated Budget

Service Component	Estimated Total Budget
1. Project Initiation and Planning, Agile Delivery, and Post-Deployment. • This budget range also accounts for the initial licensing cost until the completion of the project. With an agile delivery approach, HSH anticipates the licensing cost to increase gradually	$1,000,000
2. Maintenance and Operations	Applicant to suggest Maintenance and Operations **annual** cost in proposal using details in this RFP under Scope of Work.

Background

☛ **HSH is responsible for the Homelessness Response System (HRS), which addresses homelessness and serves individuals experiencing homelessness. One of HSH's many services is to procure, create, and manage grants and contracts with community-based organization.**

☛ **With this RFP, HSH intends to replace its existing contract and grant management system with a new Contract Lifecycle Management System (CLMS). HSH's goal is to take advantage of a modern CLMS that is designed around best practices allowing HSH to streamline and improve processes that result in timely, accurate, and easy to access information. HSH is seeking to address several challenges in the current environment including but not limited to:**

- HSH's contract, program, and fiscal staff require access to data, information, and reporting that is currently unavailable or significantly restricted, or time consuming to extract.

- HSH contracted providers have reported that their fiscal and administrative staff find it cumbersome to submit monthly invoices or access data and experience delays in invoicing as a result.

- HSH is currently using Microsoft Word and Excel generated templates to create and manage agreements because its current system lacks the ability to automate templates and generate agreements.

- Contracting workflows cannot be reconfigured and customized to integrate new programs, services, and regulations.

- The current systems are outdated and not integrated and HSH needs an updated system that offers major enhancements.

CLMS Objectives

☞ The new CLMS system must meet several objectives including but not limited to:

- Streamline business processes to take advantage of best practices through automation, integration, and workflows;

- Eliminate the need for redundant data entry;

- Provide a user-friendly and intuitive user interface to promote system use and productivity for both internal HSH contract, fiscal, and program staff users and external HSH community-based providers users;

- Eliminate the need for manual input when preparing budgets, dashboards, and reports;

- Improve and/or provide necessary reports and reporting capabilities, and access to data through inquiry or drilldown capabilities; and

- Provide interface capabilities with third-party systems.

Scope of Work – Potential System Solutions

✎ HSH is willing to consider several system solution types in response to this request. Proposed solutions may include but are not limited to any of the following components:

1. **Software-as-a-Service (SaaS) -** a SaaS platform that requires configuration to fully meet the HSH's business needs.
2. **Software-as-a-Service (SaaS) + Custom Interface Development -** a SaaS platform that requires configuration and additional interface development to fully meet the HSH's business needs.
3. **Software-as-a-Service (SaaS) + Modular Tools -** a SaaS platform and other software tools that will require configuration and integration to form a whole Contract Lifecycle Management System
4. **Commercial Off the Shelf (COTS) -** A fully developed, packaged software that only requires configuration to meet the HSH's business needs.
5. **COTS + Custom Interface Development -** A packaged system that requires both configuration and additional custom interface development to fully meet the HSH's business needs.
6. **COTS + Modular Tools –** A primary package system and other software tools that will require configuration and integration to form a whole Contract Lifecycle Management System.

✎ HSH will strongly consider a hosted delivery model where the system is hosted by the Contractor or resides on a cloud platform.

Scope of Work – Functional Areas

No.	Functional Area	No.	Functional Area
1	Contract Budget Workflow	7	Communication, Notification, and Alerts
2	Agreement Workflow	8	Invoicing
3	Program Monitoring	9	Reporting and Dashboards
4	CLMS Administration	10	Integration
5	Data Collection and Record Management	11	Other Functionalities
6	Tracking and Documenting		

Scope of Work – Overview of Project Tasks

Task	Sub-tasks
1. Project Initiation and Planning	1. Project Initiation and Management Plan
	2. Regular Project Status Reporting Plan
	3. Configuration/Design/Development/Implementation Plan (if applicable)
	4. System Release Plan
	5. System Testing Plan
	6. Requirements Traceability Plan
	7. System Maintenance, Support and Transition Plan
2. Discovery, Analysis and Design	1. Discovery Plan, Functional Design Document, Complete Detailed Requirements, Design & Specifications
	2. Develop Data Integration Design and Specifications
	3. Develop Interface Specifications (if applicable) and Design Document
	4. System Architecture and Technical Design
3. Configuration and Development	1. System Configuration/Development/Implementation
	2. Data Integration, Synchronization, and Reporting
4. Testing	1. Detailed Test Plans
	2. Test Scenarios, Test Cases, and Test Scripts
	3. Documented System Test Results
5. Project Training	1. Training Plan
	2. Training Manuals, Guides, and Materials
	3. Onboarding of Users – Initial Licensing
	4. Documented Evidence of Successful End-User Training
6. Deployment	1. Release Readiness Evaluations and Reports
	2. Deployment Plans
	3. Migration Plan
	4. System Defect Resolution Reports
	5. System Documentation
7. Implementation Closeout	1. Documented Implementation Project Closeout

Scope of Work – Maintenance and Operation Tasks

☛ The Maintenance and Operations phase of the contract will follow immediately after completion of the CLMS project. The tasks expected from the awarded Contractor during this phase will include but not limited to the following:

1. **System Maintenance:** This will include upgrades to the system, security patches, database optimization and tuning, data integrity and data resiliency including but not limited to backups and synchronous/asynchronous replication.
2. **Technical Support:** This will include technical support for troubleshooting potential system issues such as system outages and login issues. After CLMS project completion, Software vendor must be available to provide technical support during normal business hours with no greater than a one (1) hour response time. Software vendor may also be required to be available as needed outside of normal business hours for critical and high priority requests. Software vendor will agree to work with HSH to establish priority level with associated response/resolution time constraints to complete reported support activities.
3. **Hosting Services (if applicable):** This will include a hosting delivery model where the system is hosted by the Contractor.
4. **License Support (if applicable):** This will include assistance to HSH for renewal of the SaaS licenses. The license support requirements may be determined by the City's enterprise agreement.

Submission Requirements

☛ Email Appendix 1: Application, Appendix 2: Price Proposal Template and **all required attachments** in one PDF to HSHProcurements@sfgov.org

☛ Email Attachment 7: CLMS Requirements Workbook as a separate Excel Workbook to HSHProcurements@sfgov.org

☛ Email subject: RFP #140 Proposer Agency Name

☛ Applications submitted by fax will not be accepted

☛ Proposers must receive an email confirmation

Appendices

🔑 Appendix 1: Application Template

- Includes suggested page maximums

🔑 Appendix 2: Price Proposal Template

- Submit budget based on cost per overall task
- Submit annual budget for Maintenance and Operations
- Other Costs
- Describe Maintenance and Operations and Other costs on Appendix 1: Application template

Attachments

- Attachment 1: City's Proposed Agreement Terms
- Attachment 2: Proposer Questionnaire and References*
- Attachment 3: CMD Form 3*
- Attachment 4: HCAO and MCO Declaration Forms*
- Attachment 5: First Source Hiring Form*
- Attachment 6: CLMS Data Fields
- Attachment 7: CLMS Requirements Workbook*
- Attachment 8: CLMS Roadmap
- Attachment 9: CLMS List of Reports
- Attachment 10: New Agreement and Amendment Workflow Diagram
- Attachment 11: Overview of HSH's CLMS
- Attachment 12: Process Flowcharts
- Attachment 13: Wireframes

*Applicant required to return with application

Procurement Questions, Answers, and Clarifications

☛ Applicants may submit questions via email to: HSHProcurements@sfgov.org until the Questions Deadline.

☛ Proposer specific questions about compliance with the City's vendor requirements in section XIX. City Social Policy Requirements are not subject to the above deadline and may still be answered by the contact designated in this procurement.

☛ A summary of the clarifications, questions and answers pertaining to this RFP will be posted on the HSH website: http://hsh.sfgov.org/overview/procurements/.

☛ It is the responsibility of each Applicant to check for any RFP Addenda, Question and Answer postings, and other updates posted regarding this RFP.

Questions?

Reminder: Questions and answers will be posted by Tuesday July 11, 2023

Please check HSH Procurement Opportunities for regular updates on this RFP.